Social Marketing in Public Health
Training Academy

2011
Overview of Distinctive Features

Social Marketing Definition
• Uses commercial marketing technologies and theories
• Brings about voluntary behavior change
• Targets specific audiences
• Promotes social good

What’s Different? Marketing’s Distinguishing Features
• Behavioral Goals
• Consumer orientation
• Audience segmentation
• Integrated strategic planning

Behavioral Goals
• Social marketers are not satisfied unless behavior changes
• They know knowledge is often insufficient to bring about change
• They change individuals lifestyle behaviors, policy makers votes, and promote compliance with new standards

Consumer Orientation
• Commitment to understand consumer needs and wants
• Use understanding to make marketing decisions
• These make up a comprehensive strategic plan
• Serve as blueprint for intervention or program

Consumer Research
• Consumer orientation requires insight into consumer values and needs
• Whenever possible use existing data
  o Program data
  o Reports
  o Published information
  o List serves and newsletters
  o Other databases
• Unfortunately, most research doesn’t provide insights needed to understand major motivating factors so must collect additional information

Audience Segmentation
• One of first decisions a marketer makes is: which subgroups to give greatest priority in planning the intervention?
• Unlike public health professionals who often fail to segment populations or focus on the neediest, marketers make this decision systematically
Return on Investment
- Marketers balance the amount of impact they can have on a segment with the likelihood that they can get that segment to change
- They also consider variables such as: the influence a segment has on other groups, how large the group is relative to others, and the overall fit with their organizational mission

Integrated Marketing Plan
- Programs designed using data to develop strategy based on marketing’s conceptual framework
- This framework is called the Four Ps
  - Product
  - Price
  - Place
  - Promotion

Product
- Actual product - behavior
- Core product - What we’re offering people
- Augmented product
  - Tangible objects or services
  - But not educational materials

Positioning
- Which benefits best distinguish your product from the competition?
- How can you make it uniquely better?

Price
- Money
- Time
- Pleasure
- Loss of self esteem
- Embarrassment
- Psychic hassle
- Others

Place
- Place consumer will
  - Practice behavior
  - Acquire tangible objects
  - Receive services
Placement Strategy
- People and organizations that provide consumers with services, information, support
- Making services and products
  - accessible
  - convenient
  - pleasant
  - appealing
- Being there at point of decision

Promotion
- Messages: Attention-getting, memorable and persuasive
- Information channels
- Spokespersons
- Promotional activities

Promotional Activities May Include
- Policy development
- Product development
- Professional training and education
- Consumer education
- Social support
- Skills building
- Direct marketing
- Public information
- Public relations

Steps in Marketing Project
- Initial Planning
  - Market research
- Strategy Development
- Program Development
- Implementation
- Evaluation
Learning From Your Customer

Marketing Plan is Based on Data-Based Decisions

<table>
<thead>
<tr>
<th>Actual Product</th>
<th>What behavior should we promote?</th>
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<td>Priority Population</td>
<td>Which segments receive the greatest priority?</td>
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<td>Which spokespersons, information channels, message design guidelines, and activities should we use?</td>
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Formative Research is Bedrock of a Consumer Orientation
- It gives you an in-depth understanding of customer lives needed to make marketing decisions
- It does not have to be complicated or expensive, but it must be done
- Without it, you cannot make decisions based on consumer point of view

Initial Planning Process Allows You to Identify Information Gaps You Must Fill
- Background, purpose, behavioral focus
- Situational analysis
- Identification of information gaps needed to develop marketing plan
- Develop formative research plan
- Design and conduct formative research

The Research Plan Guides You in Selecting
- Who will conduct the research?
- Who will you study?
  - Who: types and source
  - How: Recruitment strategy
  - How many: Sample size
- How will you collect the information?

Two Major Data Sources Are Used
- Existing or Secondary Data
- Primary Data
The Primary Data Collection Approaches or Methodologies

- Qualitative Only
- Quantitative Only
- Mixed methods

Purpose of Qualitative Methods

- Discovery
- Identify potential factors
- Create vivid profile of segment
- Prepare survey instruments
- Interpret quantitative findings

Purpose of Quantitative Methods

- Estimate or measure
  - How many?
  - How much?
  - How important?
- Identify determinants statistically
- Evaluate impact

Most Common Data Collection Techniques Used in Marketing Research

- Observation
- Individual in-depth interviews
- Focus groups
- Surveys

Participant Observation

- Start discovery process
- Understand context
- Identify behavioral patterns

In-depth Interviews

- Use open-ended questions
- Dig deep into feelings and attitudes
- Adjust questions to fit situation
- Explore complex subjects or decisions
- Combine with structured questions

Focus Groups

- All you to watch group interaction
- Generate breadth of ideas quickly
- Encourage self revelation
- Identify suppressed themes
Surveys
- All you to identify factors with greatest impact
- Provide baseline data for evaluation purposes
- Can be used for sophisticated segmentation analyses

Types of Surveys
- Central location intercept
- Internet
- Mail
- Door to door
- Mobile technology
- Telephone
Initial Planning Phase: What You Need to Know

Marketing Plan Components

- Actual Product: Behavior being promoted
- Priority Population: Segment to give greatest priority
- Core Product: Benefits to promote
- Positioning statement: Sustainable competitive advantage
- Augmented products: Tangible goods or services
- Pricing Strategy: Costs to lower and other factors to address
- Placement Strategy: Partners, locations, distribution channels
- Promotional Strategy: Spokespersons, information channels, message design guidelines, activities

Steps in Initial Planning Phase

1. Prepare background, purpose, behavioral goal statement
2. Conduct situational analysis
3. Select priority population
4. Identify information gaps needed to develop marketing plan (4 Ps)
5. Design and conduct formative research
Step 1: Prepare Background Statement

- **Background:**
  - Write brief description of the problem or need for the program
- **Purpose:**
  - State your general purpose
- **Behavioral focus:**
  - State a behavioral goal or focus (actual product)

Behavioral Focus

- Social marketing is inappropriate for problems that do not have behavioral determinants
- Some problems are associated with only one behavior
- When multiple behaviors impact problem, need to compare alternatives

Selecting Behavioral Focus

- Based on
  - Impact
  - Likelihood of change
    - Strength of competition
    - Resistance
    - Availability of effective interventions

Selection Process

- List specific behaviors
- Estimate impact
- Estimate probability of change
  - Resistance to change
  - Availability of evidence-based interventions
  - Search for best return on investment

*Based on McKenzie Mohr, D. and Smith, W. (1999).*
Social Marketing Planning Workbook

Background Statement:

Purpose:
### Behavioral Focus: Case Study Sample

#### Initial Planning: What you need to learn to select the actual product

<table>
<thead>
<tr>
<th>List behaviors being considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Parental modeling</td>
</tr>
<tr>
<td>2. Eat more fruits and veggies</td>
</tr>
<tr>
<td>3. Physical activity</td>
</tr>
</tbody>
</table>

#### Assess Return on Investment

- Impact on problem
- Likelihood audience they will adopt

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#### Data available to assess return on investment

**Impact**

- U Berkeley Center for Weight and Health
- Peer review literature

**Likelihood of adoption**

- CDC list of promising interventions
## Behavioral Focus Worksheet

**Initial Planning: What you need to learn to select the actual product**

List behaviors being considered

1.
2.
3.

**Assess Return on Investment**

- Impact on problem
- Likelihood audience they will adopt

![Diagram](McKenzie_Mohr_1999)

**Data available to assess return on investment**

Impact

Likelihood of adoption
Step 2. Situational Analysis

Conduct SWOT Analysis
- Strengths
- Weaknesses
- Opportunities
- Threats

Consider external factors
- Demographic trends
- Cultural trends
- Economic forces
- Stakeholders
- Political forces

Consider internal factors
- Organizational resources
- Service delivery capabilities
- Partners
- Previous successes
### SWOT: Case Study Sample

#### Strengths of planning agency or group
- Strong program champion
- Diverse, powerful coalition
- Dense social networks between coalition members and program champion
- Health department staff assigned to staff project
- State funding

#### Weakness or gaps in planning agency resources
- Most coalition members have little experience using social marketing
- KY and USF have not worked together
- Funding limited
- Funder insisting on program launch within same fiscal year

#### Opportunities in external environment
- Growing awareness of obesity as a societal problem
- CDC willing to provide materials developed for VERB™ – It’s What You Do.
- Widespread recognition of VERB program
- VERB media coverage scheduled for next 3 years

#### Threats in external environment
- Growing popularity of video games and other sedentary activities
- Parent work schedules and competing demands
- Political objection to government interventions to change behavior (the nanny state)
<table>
<thead>
<tr>
<th>SWOT Worksheet</th>
</tr>
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<tbody>
<tr>
<td><strong>Strengths of planning agency or group</strong></td>
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<tr>
<td><strong>Weakness or gaps in planning agency resources</strong></td>
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<td><strong>Opportunities in external environment</strong></td>
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<td><strong>Threats in external environment</strong></td>
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</table>
Step 3. Select Priority Populations

- Primary audience - Whose behavior do you want to change?
- Secondary audiences
- Influencers
- Gatekeepers

Segmentation Schemes

- Undifferentiated
  - One product
  - One marketing strategy for everyone

- Differentiated
  - Select several segments
  - Design products for each

- Concentrated
  - Select one or two segments
  - Develop strategy for these groups
  - Best for organizations with limited resources

Segmentation Variables

- Current Behavior
- User Status
- Readiness to Change
- Desired Benefits
- Psychographics
- Demographics (often weakest way to segment)
- Others

Selecting Criteria for Selecting a Priority Population or Segment

- Return on Investment
  - Potential impact
    - Size of group
    - Need or benefit received
  - Responsiveness
    - Readiness to change
    - Likely response to your efforts
# Priority Populations: Case Study Sample

## Initial Planning: What you need to learn to select priority population

### List possible segments and/or basis variables

1. Elementary school age tweens versus middle school tweens
2. Activity level: Super star, moderate, passive, high risk
3. Gender

### Assess return on investment

- Impact on problem or amount they would benefit
- Responsiveness

### Data available to assess return on investment

**Impact**
- U Berkeley Center for Weight and Health
- Peer review literature

**Responsiveness**
- Marketing literature on tweens
- Peer review literature

### Formative research to obtain vivid profile of target segments

- Focus groups and individual interviews with parents and tweens in Lexington
## Priority Populations Worksheet

### Initial Planning: What you need to learn to select priority population

**List possible segments and/or basis variables**

1. 
2. 
3. 

**Assess return on investment**

- Impact on problem or amount they would benefit
- Responsiveness

### Data available to assess return on investment

**Impact**

**Responsiveness**

**Formative research to obtain vivid profile of target segments**
Step 4. Identify Information Gaps

Core Product
- Make actual product attractive
- Distinguish product from competition
- Select something you can truly deliver

Positioning
- Distinctive place it occupies in consumer’s mind
  - How does it differ from competition?
  - What makes it uniquely better?
  - How do they feel about the product?

Effective Positioning
- Identify ways you can make it:
  - Unique
  - Important
  - Believable
  - Sustainable Competitive Advantage

Positioning Statement
I want (priority population) to view (actual product) as (position) compared to (the competition).

Augmented Product
- Services
- Tangible goods
- Other special features

Price
- What do they exchange for benefits?
- What other factors impact behavior?

Role of Theory
- Provides list of potential variables
- Can categorize into:
  - External
  - Internal

Existing Data Sources to Identify Benefits and Costs
- Government datasets and publications
- Local program data
- Published literature
- Non-governmental agency reports
- Commercial marketing resources
# Product: Case Study Sample

<table>
<thead>
<tr>
<th>Initial Planning: What you need to learn to select core product</th>
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<tbody>
<tr>
<td>Data available to identify health benefits consumers value most</td>
</tr>
<tr>
<td>• CDC research on tweens commissioned for VERB program</td>
</tr>
<tr>
<td>• Peer review literature</td>
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<tr>
<td>Data available to identify non-health benefits consumers value most</td>
</tr>
<tr>
<td>• CDC research on tweens commissioned for VERB program</td>
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<tr>
<td>Data collection methods to create product strategy:</td>
</tr>
<tr>
<td>• Identify consumers’ perceptions of actual product’s benefits.</td>
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<tr>
<td>o Focus groups and individual interviews with parents and tweens in Lexington</td>
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<tr>
<td>• Identify consumers’ perceptions of competition’s benefits.</td>
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<td>o Focus groups and individual interviews with parents and tweens in Lexington</td>
</tr>
<tr>
<td>• Determine which benefits best distinguish actual product from the competition.</td>
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<tr>
<td>o Survey of tweens</td>
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## Product Worksheet

### Initial Planning: What you need to learn to select core product

Data available to identify health benefits consumers value most

Data available to identify non-health benefits consumers value most

### Data collection methods to create product strategy:

- Identify consumers’ perceptions of actual product’s benefits.

- Identify consumers’ perceptions of competition’s benefits.

- Determine which benefits best distinguish actual product from the competition.
### Price: Case Study Sample

**Initial Planning: Identify costs and other factors that must be addressed**

Data available to identify costs consumers must exchange for product benefits:
- CDC VERB research reports
- Peer review literature

Data available to identify other factors that deter consumers from adopting the product:
- CDC research on tweens commissioned for VERB program
- Marketing literature

### Data collection methods to create a pricing strategy:

- **Identify consumers’ perceptions of costs and other factors that deter adoption of the actual product.**
  - Focus groups and interviews with parents and tweens

- **Identify consumers’ perceptions of competition’s costs.**
  - Focus groups and interviews with parents and tweens

- **Determine which costs and other barriers must be lowered to promote the actual product.**
  - Tween survey

- **Identify ways to lower costs and other barriers to product adoption.**
  - Focus groups and interviews with parents and tweens
  - Stakeholder interviews
## Price Worksheet

**Initial Planning: Identify costs and other factors that must be addressed**

Data available to identify costs consumers must exchange for product benefits:

Data available to identify other factors that deter consumers from adopting the product

**Data collection methods to create a pricing strategy:**

- Identify consumers’ perceptions of costs and other factors that deter adoption of the actual product.

- Identify consumers’ perceptions of competition’s costs.

- Determine which costs and other barriers must be lowered to promote the actual product.

- Identify ways to lower costs and other barriers to product adoption.
Placement

Places (locations, times) consumers act

- Places (locations, times) consumers decide to act
- People and organizations that could support the behavior
- Channels for distributing tangible or augmented products

Promotion

- Potential spokespersons
- Information channels
- Activities
- Other

Placement: Case Study Sample

<table>
<thead>
<tr>
<th>Audience Analysis: What you need to learn to develop a placement strategy</th>
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<td>Data available to identify:</td>
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<td>- Marketing literature</td>
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<td>- CDC VERB research results</td>
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<td>- Institute of Medicine report</td>
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<td>Data collection methods to develop a placement strategy:</td>
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<td>- Identify where consumers decide which behavior to adopt/practice?</td>
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<td>- Identify where consumers practice the competition?</td>
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<td>- Identify where consumers would practice the actual product?</td>
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<td>- Identify people and organizations that could facilitate the adoption process?</td>
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## Placement Worksheet

**Audience Analysis: What you need to learn to develop a placement strategy**

Data available to identify:

- Places (locations, times) consumers act
- Places (locations, times) consumers decide to act
- People and organizations that could support the behavior
- Channels for distributing tangible or augmented products

Data collection methods to develop a placement strategy:

- Identify where consumers decide which behavior to adopt/practice?
- Identify where consumers practice the competition?
- Identify where consumers would practice the actual product?
- Identify people and organizations that could facilitate the adoption process?
- Determine the best channels for distributing tangible or augmented products?
## Promotion: Case Study Sample

### Audience Analysis: What you need to learn to develop a promotional strategy

Data sources available to identify:
- Potential spokespersons
- Information channels effective in reaching the priority populations
- Activities effective in promoting the behavior
  - CDC reports
  - RTI (2005)
  - Kaiser Family Foundation Reports

Data collection methods to identify best promotional strategy:
- Identify consumers’ perceptions of potential spokespersons.
- Determine which spokespersons would be most trustworthy and/or persuasive.
- Identify information channels consumers use to obtain advice about products like the target behavior and its competition.
- Determine which information channels would reach the priority population most effectively.
- Identify consumers’ perceptions of activities that could be used to promote the product.
# Promotion Worksheet

## Audience Analysis: What you need to learn to develop a promotional strategy

Data sources available to identify:
- Potential spokespersons
- Information channels effective in reaching the priority populations
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Data collection methods to identify best promotional strategy:
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- Identify consumers’ perceptions of activities that could be used to promote the product.
Designing the Formative Research Plan

Formative Research Plan
• Who will conduct the research?
• Who will you study?
• Where will you recruit them?
• How will you collect data?

Data Collection Methods
• When possible combine qualitative and quantitative
• When budget is tight
  o Qualitative if must discover key factors
  o Survey if have basic understanding of issues but need to prioritize

Qualitative Sample Sizes
• Use concept of saturation – stop when you are no longer learning
• Minimum size estimates
  o Individual – 15 per subgroup; total of 60 usually enough
  o Group – 2-3 per subgroup; 8 often enough
• Depends on analysis plan

Survey Sample Size Depends On
• Number and size of subgroups
• Degree of accuracy required
• Types of statistical procedures planned

Cost Saving Tips
• Use available data
• Conduct research in an iterative fashion
• Try low cost experiments
Formative Research Plan: Case Study Sample

Who will conduct research?  Best Start and USF Staff

<table>
<thead>
<tr>
<th>Who</th>
<th>Where</th>
<th>How</th>
</tr>
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<tbody>
<tr>
<td>Current Participants</td>
<td>Random Sample of Clinics</td>
<td>Individual and Focus groups followed by survey</td>
</tr>
<tr>
<td>Previous participants</td>
<td>WIC data</td>
<td>Mail survey followed by focus groups</td>
</tr>
<tr>
<td>Eligibles</td>
<td>Match Medicaid and WIC data</td>
<td>Mail survey followed by focus groups</td>
</tr>
<tr>
<td>Health Professionals</td>
<td>Local agencies with high and low referral rates</td>
<td>Individual and telephone interviews</td>
</tr>
<tr>
<td>WIC Staff</td>
<td>Regional Sample of Clinics</td>
<td>Individual and focus groups followed by survey of all staff</td>
</tr>
<tr>
<td>Participant Observation</td>
<td>Regional Sample of Clinics and Grocery Stores</td>
<td>Every team member works for one week and shadows two participants</td>
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</table>
Formative Research Plan Summary Worksheet

Who will conduct the research?

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Creating the Marketing Plan

Plan Elements

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Managing the Process

- Create the right expectations
- Elements of success
  - Who should attend?
  - How many sessions?
  - Who should facilitate?
  - Decide who should attend?
  - What should you provide in advance?
Evaluating Social Marketing Programs

**Targets of Evaluation**
- Why evaluate?
- What to evaluate?
- How to evaluate?
- When to evaluate
- Where to evaluate?
- Who will evaluate?

**Reasons for Evaluating (The why)**
- Responsiveness to stakeholders -- who are these stakeholders?
- Enhance program credibility
- Tracking – monitoring – program fidelity check
- Objectives being met?
- Program being delivered efficiently?
- Check the “marketing mix”
- Examine “side effects”
- Contribute to the collective “wisdom” on evaluating SM programs

**Measures of Impact (The what)**
- Change in behavioral intention
- Change in actual behavior
- Change in “readiness to adopt”
- Knowledge and attitudes
- Campaign awareness
- Changes in utilization / participation rates
- Changes in user satisfaction
- Changes to the environment or infrastructure

**Process Evaluation**
- Assessment of implementation fidelity
- Materials disseminated as planned
- Consumers were engaged in the process
- Were the 4 Ps appropriately used in the marketing mix

**Means of Getting Data (The how)**
- Quantitative methods – surveys of various sorts and modes
- Qualitative methods – observation, group interviews, informal interviews, intercept interviews
• Mixed methods

Timing of Measurement (The when)
• Prior to initiating a campaign
• During the campaign (perhaps at various times)
• Immediately upon conclusion of the campaign
• Long after the conclusion of the campaign

Measurement Sites (The where)
• Decisions are tied to the specifics of the program

Getting it Done (The who)
• Internal evaluators understand context
• External evaluators are impartial

Budget for Evaluation
• Often underestimated
• Rule of thumb is 15%
### Evaluation:

**How you know whether or not you’ve “moved the needle”**?

<table>
<thead>
<tr>
<th>What are the relevant evaluation questions and things to measure?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key questions:</strong></td>
</tr>
<tr>
<td>• Why should I evaluate? What should I evaluate? How should</td>
</tr>
<tr>
<td>I evaluate? When should I evaluate? Where should I evaluate?</td>
</tr>
<tr>
<td>• Why evaluate?</td>
</tr>
<tr>
<td>• Responsive to key stakeholders and stakeholder groups to be</td>
</tr>
<tr>
<td>identified</td>
</tr>
<tr>
<td>• Credibility</td>
</tr>
<tr>
<td>• Implementation fidelity and mid-course corrections</td>
</tr>
<tr>
<td>• Match program features and expected outcomes (logic model)</td>
</tr>
<tr>
<td>• Assess marketing mix of the 4 Ps</td>
</tr>
<tr>
<td>• Side effects</td>
</tr>
<tr>
<td>• What to evaluate?</td>
</tr>
<tr>
<td>• Outcomes: behaviors – behavioral intentions – responses to</td>
</tr>
<tr>
<td>specific campaign elements</td>
</tr>
<tr>
<td>• Policy changes and other outcomes – important and less</td>
</tr>
<tr>
<td>important</td>
</tr>
<tr>
<td>• Process measures to consider</td>
</tr>
<tr>
<td>• How to evaluate?</td>
</tr>
<tr>
<td>• Quantitative measures</td>
</tr>
<tr>
<td>• Qualitative measures</td>
</tr>
<tr>
<td>• Mixed method designs</td>
</tr>
<tr>
<td>• When to evaluate?</td>
</tr>
<tr>
<td>• Before campaign implementation (to get baseline measures)</td>
</tr>
<tr>
<td>• During (for monitoring and fidelity)</td>
</tr>
<tr>
<td>• Immediately afterwards (to see program effects)</td>
</tr>
<tr>
<td>• Long afterwards (to assess recidivism or “decay”)</td>
</tr>
<tr>
<td>• Where to evaluate?</td>
</tr>
<tr>
<td>• Depends on the project – consider feasible sites, venues,</td>
</tr>
<tr>
<td>and locations</td>
</tr>
<tr>
<td>• Who should conduct the evaluation?</td>
</tr>
<tr>
<td>• Internal evaluator</td>
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<td>• External evaluator</td>
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## Evaluation Worksheet

### What are the relevant evaluation questions and things to measure?

**Key questions:**
- Why should I evaluate? What should I evaluate? How should I evaluate? When should I evaluate? Where should I evaluate? Who should conduct the evaluation?

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### Why evaluate?

Key stakeholders / stakeholder groups MY PROGRAM is responsible to:

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Main Reasons for evaluating MY PROGRAM:

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### What to evaluate?

Main outcomes to measure for MY PROGRAM:

- Which **specific** behavior(s)
- Which specific behavioral intention(s)
- Specific campaign element(s) I’m interested in assessing
- Awareness of the campaign we’ve designed to promote “X”
- Awareness of the importance of behavior “X” -- the focus of the campaign
• Policy changes and other outcomes – important and less important

• Process measures to consider to improve campaign performance/efficiency

**How to evaluate - which combination of methods will be best for MY PROGRAM?**

• Surveys: mail, telephone, Internet, evolving social media tools

• In-depth, face-to-face interviews

• Informal interviews and anecdotal remarks

• Observation

**When to evaluate – which time(s)? Is one time particularly important?**

• Before campaign implementation (to get baseline measures)

• During (for monitoring and fidelity)

• Immediately afterwards (to see program effects)

• Long afterwards (to assess recidivism or “decay”)

**Where to evaluate?**

• Possible sites, venues, and locations for data collection and campaign assessment for MY PROGRAM:
Pretesting

What to Test
- Concepts
- Partially completed materials
- Revised products
- Final products

Steps
- Identify objectives
- Develop questions
- Select methods
- Design sampling strategy
- Pretest
- Revise, pretest, revise…

Exercise
- Handout or refer to materials to test
- Explain purpose

1. Identify Objectives
- Comprehension
- Attention-Getting
- Relevancy
- Believability
- Persuasiveness
- Untoward effects

Exercise: Select Objectives

2. Plan Methodology
- Develop questions
- Select appropriate data collection methods
- Estimate sample size
- Develop recruitment plan

Pretesting Questions
- See Sample Pretesting Questions
- Select appropriate questions from categories that correspond to your pretesting objectives.

Exercise
- Develop questions for each objective
Review and select from list
ADD any additional questions

Questions
- Comprehension
  - What do you think this brochure/poster is telling you to do?
  - What is the main idea it is trying to get across?
  - What will you get if you do that?
  - What does it tell people will happen if you do that?
  - What words/sentences are difficult to read/understand? How can we say that so it is easier to understand?
  - Others

Untoward Effects
- What parts are offensive?
- What features are annoying?
- How can they improve this to make it more valuable?

Exercise
- Review sample questions
- Circle ones you prefer
- Keep for future exercise

3. Select Data Collection Methods
- Individual interviews
  - Cheaper and easier to set up
- Group interviews
  - Allow you to watch interaction

Design Sample
- Source of subjects
- Recruitment strategy
  - Eligibility requirements
  - Invitation scripts
  - Incentives

Exercise
- Which methods?
- Where can you find respondents?
  - Eligibility requirements?
  - Incentives?
5. Pretest
- Break into pairs or triads
  - Select interviewer
  - Be yourselves
  - Record one or two lessons learned to share

Pretest Advice
- Focus on key elements
  - Not a popularity contest
  - Don’t count
  - Search for insights

Common Mistakes
- Substitute staff for participants
- Fail to sample for variation
- Overlook what is not said

6. Revise and Re-test
- Two or more rounds
- Sufficient redundancy
- Pretest with all audiences

Measures of Success
- Understand the message
- Believe the promise
- Think the messages for them
- Are not confused or offended
- Are motivated to act

Case Study Results

Measures of Success
- Understand message
- Believe the promise
- Think the message is designed for them
- Are not confused, annoyed, or offended
- Are motivated to act
Keeping Programs on Track

Organizational changes

Policy changes

Partnerships

Changing social norms

Nudges
- Limit choices
- Set a default
- Make it easy
- Use social influence and “norming”
- Give feedback
- Use incentives or avert losses
- Delay payment
- Make benefits available sooner