

DISSEMINATION PLANNING WORKBOOK

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Colorado Clinical and Translational
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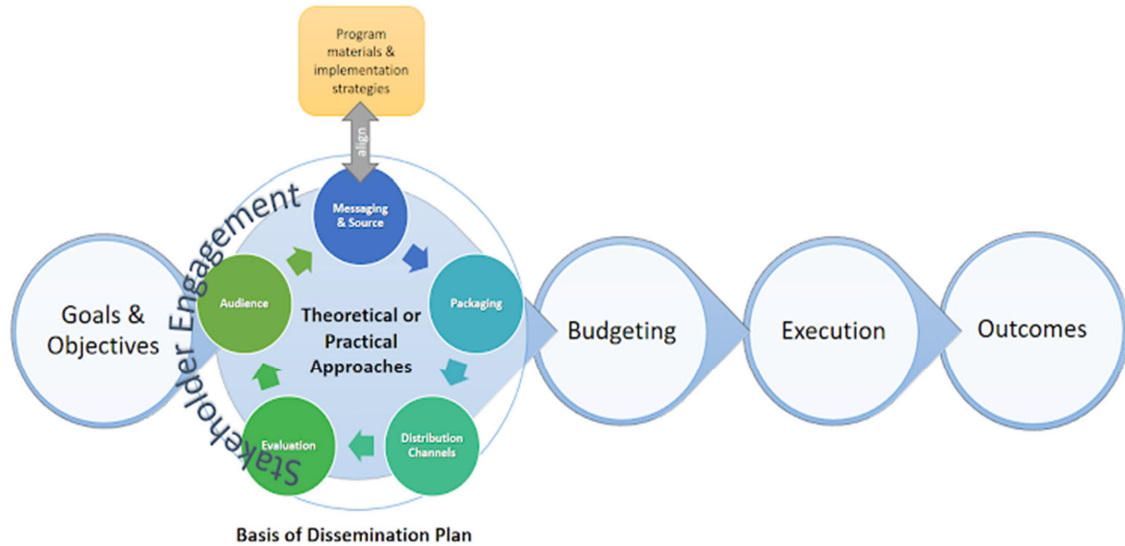
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GETTING STARTED: DISSEMINATION PLANNING OVERVIEW

There are questions you can ask yourself to get started. As you answer them, fill in the table below to help you get an overall picture of your plan. From there you can begin to develop a potential timeline of activities and think about or find out what they would cost:



Beginning this process: You will need to identify your specific goals for dissemination and think about how these goals align with your project partner engagement . Our framework can serve as a guide.

1. What are your goals of dissemination?
2. Who is your audience?
3. What do you want them to know?
4. What will your message look like/how would you like it to be packaged?
5. What are the best channels for reaching your audience?
6. How will you evaluate the success of your message(s)

Additional questions to add context to your plan:

1. What makes you an expert on this topic?

2. What are your audiences' missions/common initiatives; and, how can you demonstrate that you know who they are and what they care about?

3. How does what you're doing help engagement partners with their priorities?

4. What kind of messages do you think they would find compelling/interesting/relevant?

Audience	Communication Objective	Dissemination Objective (what will actually work in the real world with real people)	Potential Methods
Audience Segment 1			
Audience Segment 2			
Audience Segment 3			

INTRO TO DISSEMINATION PLANNING WORKSHEETS

Now that you've identified your purpose for dissemination planning, the following pages will guide in the process of detailing and executing your dissemination plan. Each page includes prompts to help you think through key questions you need to answer to identify what and how you want to communicate with key partner engagement audience members. The better you understand your engagement partners and how they fit with the underlying objective of your dissemination plan, the better you will be able to strategically communicate messages that will help you meet your ultimate dissemination goals.

Each step in the planning process is crucial to achieving your dissemination goals. You may choose to simply answer the questions included in the worksheets below. Or, if you want to take an even deeper dive, we have included additional resources that further describe these processes and the research that supports their effectiveness.

- **Don't be discouraged if at first you cannot answer every question in this planning tool.** The questions serve as prompts for you to consider these elements in the future as your dissemination effort evolves.
- **Consider this a working document.** It will help you think through the steps you will need to take to get the word out about your research finding or product.
- **This may take a few iterations!** You may want to work back and forth between questions as your thinking develops. You may do a first pass at the tool, then revisit it after a few days. You may also want to ask for input from others.

The following is adapted from the accompanying worksheets for Social Marketing: Influencing Behaviors for Good by Nancy Lee and Phillip Kotler, 2011.

STEP 1: EXPLORE BACKGROUND, PURPOSE, AND FOCUS FOR D&I

- 1.1 Summarize key background information leading to the development of this plan. (e.g., research findings, intervention development, evaluation results)

- 1.2 What is the dissemination plan *purpose*, the intended impact (partner engagement benefit or health impact)? (Ex. Improved health outcomes)

- 1.3 What is the dissemination plan *focus*? (Ex. Use of a particular evidence-based program or practice)

FURTHER READINGS:

1. Koh, S., Lee, M., Brotzman, L. E., & Shelton, R. C. (n.d.). An orientation for new researchers to key domains, processes, and resources in implementation science. *Translational Behavioral Medicine*. <https://doi.org/10.1093/tbm/iby095>
2. Agency for Healthcare Research and Quality. (2012, July 31). Communication and Dissemination Strategies To Facilitate the Use of Health-Related Evidence | Effective Health Care Program. Retrieved June 20, 2019, from AHRQ.gov website: <https://effectivehealthcare.ahrq.gov/topics/medical-evidence-communication/research-protocol>

STEP 2: CONDUCT A SITUATION ANALYSIS

A situation analysis, often called a SWOT analysis, is used to ensure a better understanding of internal and external factors that can influence positively or negatively your project’s dissemination. The findings from a situational analysis can help maximize your strengths, minimize identified weaknesses, outline strategies to use existing opportunities, and develop contingency plans for threats.

What you need to be successful?

Internal Factors

- 2.1 What internal *strengths* will your plan maximize?
(e.g., resources, expertise, management support, internal publics, current alliances and partnerships, distribution channels)

- 2.2 What internal *weaknesses* will your plan minimize?
(e.g., resources, expertise, management support, internal publics, current alliances and partnerships, distribution channels)

External Factors

- 2.3 What external opportunities will your plan take advantage of? (e.g., external publics and cultural, technological, demographic, natural, economic, and political/legal forces)
- 2.4 What external *threats* will you plan prepare for? (e.g., external publics and cultural, technological, demographic, natural, economic, and political/legal forces)

Prior and Similar Efforts

- 2.5 What findings from *prior and similar dissemination efforts* are noteworthy, those of yours or others?

FURTHER READINGS:

1. Mea, M., Newton, A., Uyarra, M. C., Alonso, C., & Borja, A. (2016). From Science to Policy and Society: Enhancing the Effectiveness of Communication. *Frontiers in Marine Science*, <https://doi.org/10.3389/fmars.2016.00168>
2. *Communication/Engagement Toolkit for CCS projects*. Communication/engagement toolkit for CCS projects. (2011, March 24). <https://www.globalccsinstitute.com/resources/publications-reports-research/communication-engagement-toolkit-for-ccs-projects/>

STEP 3: SELECT INTENDED AUDIENCES

2.1 Describe the primary intended audiences (engagement partners or end users) for your program or research results. Be as specific as possible. You may want to consider settings and levels of staffing in the organization. For example: health care providers, public health officials, health system administrators, community-based organizations, policy makers, or the public.

2.2 What do you know about your audience members?

- Demographics (age, education, race/ethnicity)

- Psychographics (attitudes, beliefs, norms, values, self-efficacy, etc.)

- Geographics (place, environmental factors)

- Organizational processes and structures (jobs, responsibilities)

- Unique barriers & facilitators:
 - Social determinants of health
 - Resources they may or may not have (money, time, personnel, etc.)
 - McGuire's Motivations
 - Diffusion of Innovations – innovators, early adopters, early majority, late majority, laggards

- 2.3 How might these factors affect their ability to receive, understand, and/or be persuaded and motivated by your message/content?
- 2.4 How might these factors be used to segment your audience into different groups with unique communication needs? Consider: Do you need to focus on one segment or multiple segments of your audience in order to achieve your purpose?
- 2.5 If you have *additional important intended audiences* (engagement partners, investors) that you will need to influence as well, describe them here. Who else will your program impact? Who else needs to align with or understand your priorities?

FURTHER READINGS:

1. John Hopkins Center for Communication Program. (2013). How to Do an Audience Analysis | The Compass for SBC. Retrieved June 20, 2019, from <https://www.thecompassforsbc.org/how-to-guides/how-do-audience-analysis>
2. Grimshaw, J. M., Eccles, M. P., Lavis, J. N., Hill, S. J., & Squires, J. E. (2012). Knowledge translation of research findings. *Implementation Science : IS*, 7, 50. <https://doi.org/10.1186/1748-5908-7-50>

STEP 4: SET OBJECTIVES AND GOALS

Objectives

- 4.1 Behavior Objective:
What, very specifically, do you want to influence your intended audience to *do* as a result of this project?
- 4.2 Knowledge Objective:
Is there anything you need them to *know*, in order to act?
- 4.3 Belief Objective:
Is there anything you need them to *believe* (i.e., attitude change), in order to act?

Goals

- 4.4 What quantifiable, measurable goals (desired action) are you targeting? Ideally, these are stated in terms of *behavior change*. Other potential desired actions are ones for project awareness, recall and/or response, and changes in knowledge, attitudes, or behavior intent levels.

FURTHER READINGS:

1. McGuire, W. J., Rice, R. E., & Atkin, C. K. (2001). Input and output variables currently promising for constructing persuasive communications. *Public communication campaigns*, 3, 22-48.
2. NSMC. (2016). Define behavioural goals and objectives.
<https://www.thensmc.com/content/define-behavioural-goals-and-objectives-1>

STEP 5: ANALYZE INTENDED AUDIENCES AND THE COMPETITION

Challenges/Pains

5.1 Make a list of *barriers* your audience may have to adopting the desired action (e.g., behavior, attitude, knowledge change). These may be physical, psychological, skills, knowledge, awareness, attitudes, and so on – and should be informed by your partner engagement work.

Desired Benefits/Gains

5.2 What are the key *benefits* your intended audience will be motivated by?
Consider: What will your intended audience gain by performing your desired action?

Competition: What your audience is currently doing

5.3 What are the major competing *alternative actions, current processes, resources or products*?

5.4 What *benefits* do your audiences associate with these actions?

5.5 What *costs or pains* do your audiences associate with these actions? To what extent are they aware of these costs? Are they okay with the status quo? Is there a cost to change that outweighs the expected benefits?

FURTHER READINGS:

1. Osterwalder, A., Pigneur, Y., Bernarda, G., & Smith, A. (2015). Value Proposition Design: How to Create Products and Services Customers Want. John Wiley & Sons.
2. Lee, N. R., & Kotler, P. (2015). Social marketing: Changing behaviors for good. Sage Publications.

STEP 6: CRAFTING A DESIRED POSITIONING

Positioning Statement/Value Proposition Hypothesis

6.1 Write a statement similar to the following, filling in the blanks.

“We want [intended audience] to see [DESIRED ACTION] as [DESCRIPTIVE PHRASE] and as more important and beneficial than [COMPETITION].”

Example: “We want community partners to see [YOUR PROGRAM] as necessary to their work and as more important and beneficial than their current processes/program.”

Your positioning statement will be used to guide the communication strategies you choose for your dissemination plan. Refer back to this to make sure your choices moving forward meet the goals identified in your positioning statement.

FURTHER READINGS:

1. Koby, A. (n.d.). The What and Why of Brand Positioning Statements. Retrieved from <https://www.adherecreative.com/blog/the-what-and-why-of-brand-positioning-statements>
2. Stayman, D. (2015). How to Write Market Positioning Statements. Retrieved from: <https://ecornell-impact.cornell.edu/how-to-write-market-positioning-statements/>

STEP 7: DEVELOP DISSEMINATION STRATEGIES

7.1 Designing an Effective Call to Action

7.1.1 What is the major perceived benefit, your intended audience wants from performing the action that you will highlight? (Choose one or a few from those identified in 5.2)

7.1.2 What is the *Call to Action*, the features/name for the desired action? (Refer back to your behavior objective in 4.1 and refine/finalize here.)

What specifically will you ask people to do in order to accomplish the *desired action*? Sometimes these are the same and sometimes they are different. Your call to action should focus on what “ask” is most likely to be well-received by your intended audience and also lead to the desired action.

Example Call to Action

- Get more information about [YOUR PROGRAM] today!
- Schedule a meeting to learn how you can integrate [YOUR PROGRAM].
Desired action: Use [YOUR PROGRAM].

Additional Factors to Consider

7.1.3 Are there any *new tangible objects* that will be included in program efforts? Ex. program materials, instruction manuals, technology, additional resources for implementation, etc.

7.1.4 Are there any *improvements* that need to be made to existing tangible objects?

7.1.5 Are there any *new services* that will be included in program efforts?

7.1.6 Are there any *improvements* that need to be made to existing services?

FURTHER READINGS:

1. Spring Bonnie, Ockene Judith K., Gidding Samuel S., Mozaffarian Dariush, Moore Shirley, Rosal Milagros C., ... Lloyd-Jones Donald. (2013). Better Population Health Through Behavior Change in Adults. *Circulation*, 128(19), 2169–2176.
<https://doi.org/10.1161/01.cir.0000435173.25936.e1>
2. Office of the Surgeon General, A. S. for H. (ASH). (2015, June 24). Executive Summary from Step It Up!: Call to Action [Text]. Retrieved from HHS.gov website: <https://www.hhs.gov/surgeongeneral/reports-and-publications/physical-activity-nutrition/walking-executive-summary/index.html>

7.2 Addressing Challenges (Pains/Costs)

Align with your Implementation Strategies

7.2.1 If you will be including tangible objects (ex. technology, education materials) and/or services (ex. training) in your dissemination and implementation efforts? What, if anything, will the intended audience have to pay for them?

7.2.2 Will there be any *monetary incentives* for target markets (e.g., decreased healthcare costs) or monetary disincentives you will highlight (e.g., fines, increased taxes, potential lawsuits)?

7.2.3 Will you use any *nonmonetary incentives* (e.g., recognition, reward, accreditation, patient satisfaction) or *nonmonetary disincentives* (e.g., negative visibility)?

FURTHER READINGS:

1. Lavergne, M. R. (2017). Financial incentives for physicians to improve health care. *CMAJ :Canadian Medical Association Journal*, 189(49), E1505–E1506. <https://doi.org/10.1503/cmaj.171126>

7.3 Making Access Convenient

As you determine each of the following, look for ways to make access to and learning about your program more convenient and appealing. Ideally, you want to align the place where your audience accesses program materials with the place they will implement the program (i.e., perform the desired action).

7.3.1 *Where* will you encourage and support your intended audience to *perform the desired action* (In the clinic? Online?) and *when*?

7.3.2 *Where* and *when* will the target market acquire any related tangible objects (ex. Technology, education materials, implementation guide, user guide)?

7.3.3 *Where* and *when* will the target market acquire any associated services (ex. training)?

7.3.4 Are there any groups or individuals in the distribution channel(s) (the outlets you will use to disseminate your program) that you will target to support efforts?

Further Reading

Edgar, T., Huhman, M., & Miller, G. A. (2015). Understanding “Place” in Social Marketing: A Systematic Review. *Social Marketing Quarterly*, 21(4), 230-248. <https://doi.org/10.1177/1524500415607453>

7.4 Communicating with your Audience: What Will You Say, Who Will Say It, How, And Where?

7.4.1 *What will you say?*

What key messages do you want your campaign to communicate to intended audiences?

Is your Call to Action effectively worded?

What will you need to communicate to support your Call to Action?

Consider: Various strategies for persuading your audience.

What do your audience members care about?

What has worked to persuade your intended audience in the past?

What do you know about your audience's attitudes, knowledge, beliefs, and values that you can incorporate into your message(s)?

Strategies that you might consider using to make your message more effective include:

- Message features: (the content, structure, and style of the message): scientific evidence, statistics (logic appeals), narrative/storytelling (emotional appeals), testimonial (character appeals)
- Message framing: (the context and approach that is used to construct information): Argument framing, gain-loss framing, issue framing, attribute framing, risky-choice framing
- Incorporating theory: Theories can be used to identify constructs that can inform message components and in turn increase the persuasiveness of your messages. Some theories that might inform you message design include:
 - Extended Parallel Processing Model/ Fear appeals/ sensation seeking
 - Elaboration Likelihood Model
 - Theory of Reasoned Action/Theory of Planned Behavior/Integrated behavioral model
 - Gain/Loss framing
 - Social norm theories
 - Tailored messaging
 - Stages of Change/Trans-theoretical model
 - Health Belief Model
 - Precaution Adoption Process Model

FURTHER READINGS:

1. Harrington, N. G. (2016). Persuasive Health Message Design. *Oxford Research Encyclopedia of Communication*. <https://doi.org/10.1093/acrefore/9780190228613.013.7>
2. O'Keefe, D. J. (2017). Message Framing Variations in Health and Risk Messaging. In J. Nussbaum (Ed.), *Oxford Research Encyclopedia: Communication* Oxford University Press.
3. Armenakis, A. A., & Harris, S. G. (2002). Crafting a change message to create transformational readiness. *Journal of Organizational Change Management*. <https://doi.org/10.1108/09534810210423080>
4. Bernerth, J. (2004). Expanding Our Understanding of the Change Message. *Human Resource Development Review*, 3(1), 36–52. <https://doi.org/10.1177/1534484303261230>
5. Teegen, D. (2001). Review: A Cognitive-Affective Model of Organizational Communication for Designing IT. *MIS Quarterly*, 25(2), 251–312. <https://doi.org/10.2307/3250931>
6. Hovland, I. (2005). Successful Communication: A Toolkit for Researchers and Civil Society Organisations. Retrieved November 6, 2023 <https://odi.org/en/publications/successful-communication-a-toolkit-for-researchers-and-civil-society->

7.5 Messengers (Source)

7.5.1 Who will say it?

Who will deliver the messages and/or be the perceived sponsor?

Consider questions such as: Who do engagement partners trust?

Who has influence on engagement partners?

Who will grab audience members' attention?

7.5.2 Creative Packaging Strategies

How will you say it?

Which media fit your available distribution channels (see below)?

How can you increase attention and engagement with your message? Consider issues of clarity, vividness, attractiveness, complexity, comprehension.

What are standard means for packaging your program's message/information (e.g. creating a website, press release, or newsletter announcement)?

Do you need to conform or can you try something different?

Summarize, describe, or highlight elements such as logo, taglines, copy, visuals, colors, script, actors, scenes, and sounds in broadcast media.

FURTHER READINGS:

1. McGuire, W. J. (2013). McGuire's Classic Input–Output Framework for Constructing Persuasive Messages. In *Public Communication Campaigns* (Fourth Edition, pp. 133–145). <https://doi.org/10.4135/9781544308449>

Ensuring your message design works for audience members

What plans do you have for pre-testing messages?

- Focus groups
- Survey/exposure testing (looking at changes in knowledge, attitudes, beliefs, behavioral intentions, etc.)

Is your message clear, concise, comprehensible?

Are your theory-based message components valid (e.g., fear appeal induces fear)?

7.5.3 Distribution (Communication) Channels

Where will you say it?

What communication channels will you use? What channels are best for reaching your intended audience? (Consider how you might align these with the place where people access/implement your program)

- Print
- Mail
- Email
- Internet
- Mobile apps
- Phone
- Television
- Radio

What role might interpersonal communication play?

- Word of mouth/Referrals
- Patient-provider communication
- Social Support and Networks

What channels/platforms do your audience members use? To which do they most attend? (eg, people often disregard direct mail but will read a text message).

What channels/platforms are most appropriate for your message and packaging? (e.g., you cannot send a video via mail).

What considerations need to be given to engagement? (e.g. social media and interpersonal communication are more interactive than traditional media channels).

FURTHER READINGS:

1. Message Framing Variations in Health and Risk Messaging. Daniel J. O'Keefe (2017) <https://doi.org/10.1093/acrefore/9780190228613.013.308>
2. Smith, A., & Anderson, M. (2018, March 1). Social Media Use 2018: Demographics and Statistics | Pew Research Center. <https://www.pewresearch.org/internet/2018/03/01/social-media-use-in-2018/>
3. Anderson, M., & Perrin, A. D. (2017, May 17). Tech Adoption Climbs Among Older Americans | Pew Research Center. Retrieved June 21, 2019, from <https://www.pewinternet.org/2017/05/17/tech-adoption-climbs-among-older-adults>

STEP 8: DEVELOP A PLAN FOR EVALUATION AND MONITORING DISSEMINATION

How will you know if you have met your dissemination goals? What parts of this program worked and didn't work? What are your success criteria? Are there measurable indicators for these criteria? How can dissemination be improved?

Questions to help you create your evaluation plan:

- 8.1 What is the *purpose* of this evaluation? Why are you doing it?

- 8.2 *Who* is the evaluation being conducted for (internal or external engagement partners)? Who will you present it to?

- 8.3 *What goals* from Step 4 will be assessed?

- 8.4 *What techniques and methodologies* will be used to conduct these assessments?

- 8.5 *When* will these assessments be taken?

- 8.6 *How* will assessments be reported and to whom?

FURTHER READINGS:

1. Glasgow, R. E., & Riley, W. T. (2013). Pragmatic measures: what they are and why we need them. *American journal of preventive medicine*, 45(2), 237–243. <https://doi.org/10.1016/j.amepre.2013.03.010>
2. RE-AIM – Reach Effectiveness Adoption Implementation Maintenance. (2019). <http://www.re-aim.org/>

STEP 9: DETERMINE BUDGETS AND FIND FUNDING SOURCES

- 9.1 What costs will be associated with *program production*?
- 9.2 What costs will be associated with *program distribution*?
- 9.3 What costs will be associated with *message design*?
- 9.4 What costs will be associated with *program dissemination (promotion)*?
- 9.5 What costs will be associated with *dissemination evaluation*?
- 9.6 If costs exceed currently available funds, what potential additional funding sources can be explored?

STEP 10: COMPLETE AN EXECUTION PLAN

10.1 Will there be phases to the dissemination roll-out? How will they be organized (i.e., by market, audience, objectives, activities)?

10.2 For each phase, what will be done, who will be responsible, when will it be done, and for how much?

Dissemination Activity	Who is Responsible	Timeframe	Budget