



D2V DISSEMINATION PLANNING WORKBOOK

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Data Science to Patient Value (D2V)

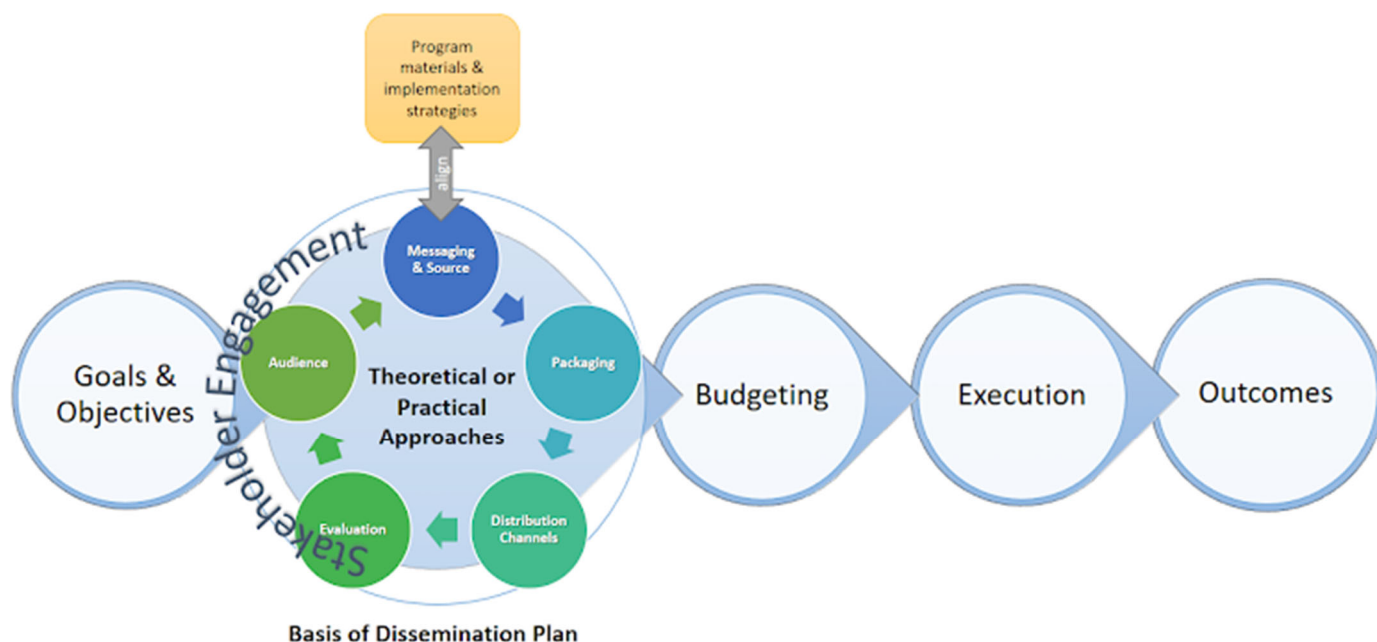
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GETTING STARTED: DISSEMINATION PLANNING OVERVIEW

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



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:

1. What are your goals of dissemination?
2. Who is your audience/who are your stakeholders?
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 stakeholders 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
Stakeholder 1			
Stakeholder 2			
Stakeholder 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 stakeholder audience members. The better you understand your stakeholders 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 DISSEMINATION PLAN

- 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 (stakeholder 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. University of Colorado Department of Family Medicine. (2017). Design for dissemination. <http://design4dissemination.com/home>
3. 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: YOUR OWN SITUATION

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 Forces

- 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. Global CCS Institute. (n.d.). SWOT Analysis | Global CCS Institute.
<https://hub.globalccsinstitute.com/publications/communication-and-engagement-toolkit-ccs-projects/swot-analysis>
- 2. 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*, 3. <https://doi.org/10.3389/fmars.2016.00168>

STEP 3: SELECT TARGET AUDIENCES

- 3.1 Describe the *primary target audiences* (stakeholders 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.
- 3.2 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
- 3.3 How might these factors affect their ability to receive, understand, and/or be persuaded and motivated by your message/content?
- 3.4 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?
- 3.5 If you have *additional important target audiences* (stakeholders, 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* : 1S, 7, 50. <https://doi.org/10.1186/1748-5908-7-50>
3. Wicks, B. (2015, July 1). Our Approach to Stakeholder Engagement. Retrieved June 20, 2019, from The Advisory HUB website: <http://www.theadvisoryhub.com.au/our-approach-to-stakeholder-engagement/>

STEP 4: SET OBJECTIVES AND GOALS

Objectives

- 4.1 Behavior Objective:
What, very specifically, do you want to influence your target 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>
3. Colorado Department of Public Health & Environment. (2018, September 28). Community-based social marketing. Retrieved from Department of Public Health and Environment website: <https://www.colorado.gov/pacific/cdphe/community-based-social-marketing>

STEP 5: ANALYZE TARGET 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 stakeholder engagement work.

Desired Benefits/Gains

- 5.2 What are the key *benefits* your target audience will be motivated by? Consider: What will your target 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 [TARGET AUDIENCE] to see [DESIRED ACTION] as [DESCRIPTIVE PHRASE] and as more important and beneficial than [COMPETITION].”

Example: “We want stakeholders 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 #Cornell360 website: <https://blog.ecornell.com/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 target 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 target audience and also lead to the desired action. Example: *Call to Action*: Get more information about [YOUR PROGRAM] today! –or– 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 target 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 target 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 READINGS:

1. 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?

Messages

7.4.1 What will you say?

What key messages do you want your campaign to communicate to target 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 target 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 your 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. <https://drive.google.com/open?id=1x7xuY-Vqz-rqZ2A07V0iLcp8CTWRdmbN>
3. Noar, S. M. (2006). A 10-year retrospective of research in health mass media campaigns: Where do we go from here?. *Journal of Health Communication*, 11(1), 21-42.

4. 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>
5. Bernerth, J. (2004). Expanding Our Understanding of the Change Message. *Human Resource Development Review*, 3(1), 36–52. <https://doi.org/10.1177/1534484303261230>
6. Te'eni, 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>
7. Hovland, I. (2005). Successful Communication: A Toolkit for Researchers and Civil Society Organisations. Retrieved September 9, 2019, from ODI website: <https://www.odi.org/publications/155-successful-communication-toolkit-researchers-civil-society-organisations>

Messengers (Source)

7.4.2 Who will say it?

Who will deliver the messages and/or be the perceived sponsor? Consider questions such as: Who do stakeholders trust? Who has influence on stakeholders? Who will grab audience members' attention?

Creative Packaging Strategies

7.4.3 How will you say it?

Which media are best for communicating your key message(s)?

- Print? – posters, mailers, flyers, newspaper/magazine ads, stickers, [promotional merchandise](#), policy briefs,
- Digital? – digital graphics (infographics), video, animated content, mobile applications
- Audio? – radio, digital streaming

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](#)? Is your message clear, concise, comprehensible? Are your theory-based message components valid (e.g., fear appeal induces fear)?

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

Distribution (Communication) Channels

7.4.4 Where will you say it?

What communication channels will you use? What channels are best for reaching your target audience? (Consider how you might align these with the place where people access/implement your program—refer back to 7.3)

- 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? (e.g., 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)
DOI: 10.1093/acrefore/9780190228613.013.308
2. World Health Organization. (n.d.). Identify effective channels. Retrieved from WHO website: <http://www.who.int/communicating-for-health/principles/accessible/multiple-channels/en/>
3. Smith, A., & Anderson, M. (2018, March 1). Social Media Use 2018: Demographics and Statistics | Pew Research Center. <https://www.pewinternet.org/2018/03/01/social-media-use-in-2018/>
4. 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 stakeholders)? 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 RE and Riley T (2013). [Pragmatic Measures: What They Are and Why We Need Them](#). *American Journal of Preventive Medicine*, 45(2): 237-43.
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?

[illegible]