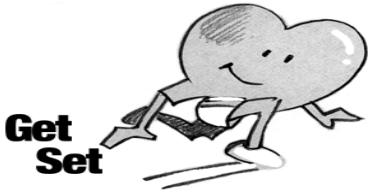


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GET SET

Get Set

Develop strategies

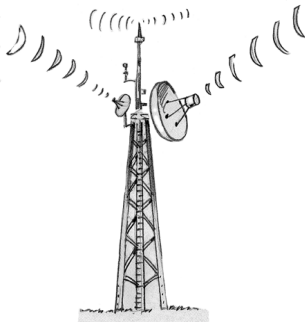


You have reviewed the recruitment and registration strategies, and determined, if you will be evaluating the program, how you will do it. Now you are ready to develop your marketing plan. The marketing plan establishes where the program will be delivered, when and by whom. It incorporates the methods of promotion, the responsibilities of the partners, training of the staff/volunteers, and the selection and adaptation of the promotional materials.

Develop the marketing plan:

Below is a list of activities to help ensure that you have covered all the steps in your marketing plan.

- 1 Record where and when the program will be promoted based on the discussions held in "Get Ready."
- 2 Determine what sources: media, flyers, etc., will be used to promote the program. Some potential sources for promotion are:
 - Newspapers: news releases, paid ads in city and county papers.
 - Radio stations: PSA's and paid ads, may wish to select radio stations that target specific audiences (e.g. English and French, seniors, etc.), radio interviews by telephone or in-person.
 - Cable T.V., PSA announcements, paid ads on local T.V. stations, interviews with media at local stations or on Cable.
 - Worksites: presentations, flyers, posters, pay cheque stuffers, message on internal communication system.
 - Service clubs: presentations, booths with flyers etc.
 - Grocery stores: grocery bag stuffers, message in the advertised weekly specials.
 - Post office or volunteer agencies to distribute flyers or mail box stuffers.



3. Determine if the recruitment phase will be limited to a specific time-period, staggered to accommodate implementation of the program into various areas such as the community, worksites, health sector and so forth, or whether it will be continuous throughout the year.
4. Establish the methods to be used for recruitment based on the discussions held in the planning stage.
5. Establish responsibility:
 - Establish the roles of the lead agency and each of the community partners in promoting the program. For example, the lead agency may choose to develop and handle all media promotion. The partners may choose to promote the program through their normal business/service activities using flyers, posters, word-of-mouth, presentations to the public, presentations and/or displays at worksites, Health Fairs, service clubs and so forth.
 - Assign responsibilities to each agency participating in the marketing campaign.
 - Identify which individual is responsible for a particular activity as indicated in the marketing campaign.
 - Choose a spokesperson to be the media contact. If you are promoting the program to a Francophone audience using French media, ensure that a Francophone media contact is available.
 - Identify who needs to be contacted by letter, by telephone, and/or by person at each promotional site to inform them about the program and to get permission (and assistance, e.g. pay cheque stuffers) to conduct the promotion.
6. Establish time lines:
 - Itemize the time and date each activity takes place.
7. Establish costs:
 - Attach a dollar value to each promotional activity where appropriate.

Get Set

Establish registration procedures

The registration methods used will depend on where the program is being launched, i.e., worksites or the community. If the planning committee decided on telephone registration you need to consider the following:



- Have staff/volunteers to answer telephones ready for action over the recruitment period.
- Inform your switchboard and key personnel in your organization of the registration process and where to direct calls.
- Inform key personnel in the lead agency and other agencies participating in the promotion, of the launch date and recruitment process to prevent confusion and misdirection of clients.
- Arrange a dedicated telephone line to answer calls regarding the program and for recruitment. Depending on the extent of media promotion used, several people (3 to 5) may be needed to answer the telephones all day for one to two weeks. Therefore, arrange that the calls bounce from line-to line to ensure that they are answered rather than going into voice mail.
- If you think that some media may call for more information or to do a story, provide them with a separate line.
- Do not use a Hot Line or an Information Line that addresses other issues or programs. When this was attempted by one of the pilot sites, the line quickly became backlogged and clients and personnel alike frustrated.
- Do not rely on voice mail to take most of the calls. You may lose clients this way.
- Develop an appropriate voice mail message for clients who call to register after hours and on weekends. Ensure that voice mail messages are cleared the next day and calls returned as soon as possible. A sample message might be:

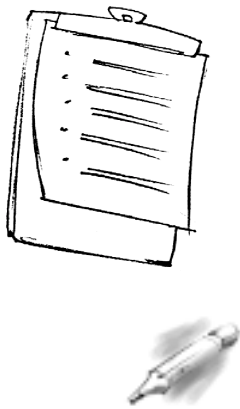
Get Set

“Thank you for calling the *FOOD STEPS* hotline. The (agency) is closed right now, but your message is important to us. Please leave your name, telephone number, and the best time to reach you, preferably, through the day. Or, you may choose to call back between the hours of — to —. Thank you for your interest in the *FOOD STEPS* program.”

If registration will be done on-site e.g., at a booth at a Health Fair or presentation, through an Occupational Health Nurse at a worksite, or through an internal e-mail or communication system, or through the mail, pay cheque stuffers, flyers, etc., determine how this will be done.

Develop an evaluation plan (optional)

Evaluation is optional, but encouraged in order to see if the program is reaching your target audience and being effective in helping them reduce dietary fat. If the planning committee decides to pursue evaluation, review the information in this Guide under “Finish.” This section will provide you with some ideas for evaluation and a list of resources that you can consult.



Your evaluation strategy must be incorporated into your initial planning for delivering the program as data collection will have an impact on the delivery and monitoring of the program. Your evaluation plan will need to determine the methods of data collection such as group interviews, telephone interviews, or survey instruments. If survey instruments will be used, see if the evaluation surveys in Appendix C can be used or modified or if new tools need to be developed. You also need to determine the responsibility of each partner in data collection and who will be responsible for entering data into a statistical analysis program and who will be responsible for doing the analysis, write-up and dissemination of the results. You may wish to do something very simple that doesn't involve data analysis. The choice is yours, but we do encourage you to at least collect demographic information to determine who the program is appealing to in your community.

Determine staffing needs

Once you know your marketing strategy you can determine how many staff and/or volunteers you will need to promote and run the program. *FOOD STEPS* can be delivered by one person within the lead agency, but clerical support would facilitate delivery. One contact person is required from each of the participating partners to assist with promotion and implementation at their site. As mentioned earlier, volunteers can make a significant contribution and can assist with promotion, recruitment, and data entry.

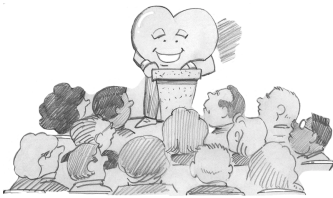
The amount of time that each staff person is required to commit to the project depends on the complexity of the promotional campaign (i.e., promotion of the program to the community, health sector and worksites or just to worksites alone) and the number of venues targeted (i.e., one large worksite, several large worksites). The planning, promotional, and recruitment phases are the most time intensive components of the program and the program coordinator from the lead agency may need to allot at least fifty percent of their time to these components depending on the number of clients recruited. Partners at participating sites may need less time depending on their involvement. The program coordinator will likely require additional assistance during the recruitment phase of the program to answer telephones, take registrations and so forth, particularly if the media is used to promote the program. Once the program is up and running, it is not time intensive to maintain.

The monitoring function requires that booklets be sent out accompanied by the appropriate cover letter, as requested by the client, data entered into a spreadsheet or wordprocessor program, and if evaluating with survey data, this data needs to be collected and entered into a statistical program for analysis. These functions can be performed by a clerk. A Registered Dietitian is required as a consultant to answer nutrition related questions that might arise, but is not required to implement the program. This nutrition expertise must be arranged if a Registered Dietitian is not on staff. It may possibly be obtained through the local public health unit, the local hospitals or through the Provincial Coordinator of the *FOOD STEPS* program.

Get Set

The program coordinator requires computer skills or must have access to clerical and/or technical staff/volunteers who can adapt the promotional and program materials and who can generate letters and mailing labels for clients of the program.

Once you have determined the number of staff and/or volunteers who will be participating in either the promotion of the program or the implementation and the evaluation, you need to train them. Below we provide an outline of the things to cover.



Select and train staff/volunteers

- provide a brief overview of the program and implementation procedures
- familiarize them with the marketing campaign
- discuss the time lines of the project
- identify their specific roles in promotion, registration of clients collection of evaluation data if appropriate, monitoring of the program, and entering of evaluation data if appropriate
- provide them with a job description if necessary.



Select, adapt or develop promotional materials

The next step in the process is to adapt and personalize with your logo, the promotional and the program support materials. These include the booklets which can be stamped with your address and telephone number on the back cover, as well as, the materials in this Leader's Guide such as, newspaper ads, flyers, registration forms, order forms, and cover letters. Sample surveys are also provided if you wish to evaluate using surveys. The planning committee determines which of the promotional and program support materials in this Leader's Guide can be adapted for their purposes or if new materials need to be developed.

Get Set

Adaptation of the above materials requires a 486 or higher IBM compatible computer with *Windows 95*® and a minimum of 32 Ram memory. Also, it requires an individual with the skills to adapt the materials or develop new ones. Hard copies as well as, a computer version on a CD disc, of the *FOOD STEPS* logo, the graphics most frequently used for promotion, and the promotional and program support materials are included with this Guide.

The responsibilities of the planning committee at this stage of implementation is to:

- Select stage-based ads, news releases, Public Service Announcements, flyers and presentation material from this Leader's Guide, (Appendix A) for promotion of the program.
- Arrange for promotional materials to be adapted. If promoting to a Francophone audience, French news ads, PSA's, etc. need to be developed, or the English versions translated.
- Review program support materials and adapt if necessary.
- Arrange printing of all promotional and program support materials to be used.
- Select and modify evaluation tools enclosed in this Leader's Guide or develop your own tools.
- Arrange for a stamp with your address, logo and telephone number to be made if one is not already available.
- Stamp (with the above stamp) the back covers of all booklets.

Promote program



You are now ready to promote the program. The planning committee has decided which recruitment strategies they will use and how and where they will use them. They have also developed a detailed marketing plan for the agencies participating in the promotion outlining their role and responsibilities in the promotion of the program as well as, any materials they might require. For example: an Occupational Health Nurse of a large worksite might

Get Set

need posters, flyers, and pay cheque stuffers to promote the program. Volunteers of the local Heart and Stroke Foundation and the local Canadian Cancer Society might require posters, flyers and a script for presentations at Health Fairs, service clubs, and mall displays. The lead agency coordinates the promotional activities of all the partnering agencies.

To ensure that the promotion progresses smoothly:

- Have all materials for promotion, registration, and evaluation ready.
- Distribute materials to partnering agencies according to their roles in the promotional campaign. Remember that worksites may need four to six weeks notice if pay cheque stuffers are to be used especially, if the worksite has two payroll dates because of a large work force.
- Contact media such as, radio, television, and newspapers; worksites, malls, Health Fairs, service clubs, and so forth to inform them about the program and set up interviews, presentations, news releases, press conferences and ads as per recruitment strategies.
- Send out media releases and newspaper articles according to dates established previously with the media.
- Ensure the media contact(s) is free to deal with calls from the media.
- Establish presentation dates to worksites, service clubs, etc., if this is part of your marketing strategy.
- Promote the program.
- Launch on time!

The program has been promoted and calls are coming in. Now you need to register clients into the program. The next section “GO” tells you how, following the Action checklists.

Get Set

Step 2: Develop the Marketing Plan

Action Checklist	Responsibility	Date Done
<input type="checkbox"/> Identify where the program will be promoted.	_____	_____
<input type="checkbox"/> Establish the time frame for promotion.	_____	_____
<input type="checkbox"/> Set program promotion launch date.	_____	_____
<input type="checkbox"/> Set program registration deadline (if applicable, some sites may wish to accept new clients all through the year).	_____	_____
<input type="checkbox"/> Choose a media spokesperson(s). (Francophone as well as English if promoting program is Francophone.)	_____	_____
<input type="checkbox"/> Identify what media will be used.	_____	_____
<input type="checkbox"/> Identify what sample promotional aids from the Leader's Guide will be used or if new promotional materials need to be developed.	_____	_____
<input type="checkbox"/> Assign responsibilities to each agency participating in the campaign.	_____	_____
<input type="checkbox"/> Assign personnel/volunteers to specific tasks, e.g. presentations, etc.	_____	_____
<input type="checkbox"/> Establish costs where applicable.	_____	_____
<input type="checkbox"/> Train the staff/volunteers.	_____	_____

Get Set

Step 3: Establish Registration Procedures		
Action Checklist	Responsibility	Date Done
<input type="checkbox"/> Identify registration procedures based on marketing campaign	_____	_____
<input type="checkbox"/> Organize telephone lines to be dedicated to the <i>FOOD STEPS</i> program during recruitment.	_____	_____
<input type="checkbox"/> Inform switchboards of recruitment process for this program and when to direct calls.	_____	_____
<input type="checkbox"/> Inform key personnel in lead agencies and in other agencies participating in the promotional plan to prevent confusion and misdirection of clients.	_____	_____
<input type="checkbox"/> Arrange staff/volunteers to answer telephoens.	_____	_____
<input type="checkbox"/> Organize a voice message for clients reistering after hours.	_____	_____
<input type="checkbox"/> Organize a mechanism to clear voice mails or backlogged calls for the program.	_____	_____
<input type="checkbox"/> Adapt or modify generic (i.e., non-staged, non-gender specific) welcoiming cover letter in Appendix B 7 to facilitate registration on-site.	_____	_____

Get Set

Step 4: Adopt Promotional and Program Support Materials

Action Checklist	Responsibility	Date Done
<input type="checkbox"/> Adapt program support materials, see Appendix A.	_____	_____
<input type="checkbox"/> Select and adapt promotional materials, see Appendix B.	_____	_____
<input type="checkbox"/> Adapt or develop evaluation tools, see Appendix C.	_____	_____
<input type="checkbox"/> Organize printing/photocopying of all materials, program delivery, promotional, evaluation survey instruments (if this is your method of evaluation).	_____	_____
<input type="checkbox"/> Organize letter-size (4 x 9) envelopes prepaid (optional) with <i>FOOD STEPS</i> logo (optional for return of surveys if this is the method of evaluation).	_____	_____
<input type="checkbox"/> Organize envelopes (6.5 x 9.5) for mailing of <i>FOOD STEPS</i> booklets.	_____	_____
<input type="checkbox"/> Organize pre-paid postage or purchase of postage for delivery of booklets.	_____	_____
<input type="checkbox"/> Organize a stamp with your address, logo and telephone number to be made if not already available.	_____	_____
<input type="checkbox"/> Stamp (with above stamp) the back covers of all the <i>FOOD STEPS</i> booklets.	_____	_____
<input type="checkbox"/> Do final check on printed/photocopied materials.	_____	_____

Get Set

Step 5: Promote Program

Action Checklist	Responsibility	Date Done
<input type="checkbox"/> Distribute materials to partnering agencies according to their roles in the promotional campaign.	_____	_____
<input type="checkbox"/> Send out materials, eg. pay cheque stuffers, to worksites. Remember that worksites may need four to six weeks' notice if pay cheque stuffers are being used, especially if the worksite has two payrolls because of a large workforce.	_____	_____
<input type="checkbox"/> Contact the media, worksites, malls, Health Fairs, service clubs, etc. as per your promotional campaign, to inform them about the program and set up interviews, presentations, and press conferences.	_____	_____
<input type="checkbox"/> Send out news releases and paid ads to newspapers and Public Service Announcements and/or paid ads to radio and TV.	_____	_____
<input type="checkbox"/> Conduct presentations to worksites, service clubs, etc., if this is part of your marketing strategy.	_____	_____