NIH HEAL INITIATIVE

HEALing Communities Study

Play 5: How to Assess Campaign Progress in Communities and Identify Potential Enhancements

Get Started

» WHAT?

This playbook is a resource to use in **assessing campaign implementation and activities among your state's community coalitions.** A formal assessment will help you understand what each community is doing, what is working well, what might be improved, and what additional resources are needed to optimize the reach, frequency, and effectiveness of subsequent campaign activities.

The playbook includes several tools for conducting these assessments, including a strengths, weaknesses, opportunities, and threats (SWOT) analysis worksheet and a Start, Stop, Continue exercise.

» WHO?

Community campaign assessments should be led by the research sites. However, an effective assessment will also engage coalition staff, community organizations, and other stakeholders as true partners in the process. Be sure to engage these partners early, rather than surprise them with assessment requests.

» WHEN?

You should conduct campaign assessments on a regular schedule (e.g., every 3 months) to stay abreast of community activities and resource needs. If possible, time the assessments so communities have had sufficient time to implement activities, while still being able to recall those activities accurately.

» WHY?

Campaign assessments are critical for several reasons:

1. **Understanding Local Implementation.** They help research sites to understand how each community implements campaign activities and how they adapt those activities for their own local context. This enables research sites to speak in detail about what is happening on the ground in their communities.
2. **Identifying Challenges.** Assessments help identify challenges or limitations in community implementation activities. These challenges might be skill based (e.g., limited communication experience), resource based (e.g., desire for different images or material formats), or logistical (e.g., difficulty identifying and connecting with the right community partners).
3. **Identifying Needed Resources.** Campaign assessments provide communities with an opportunity to request the resources they need to implement activities effectively at the local level. Resources are more than just funding and may include campaign materials/assets, guidance from experts, assistance customizing materials, and other types of support.
4. **Sharing Lessons Learned.** The assessments help research sites identify what is and is not working well in communities and share those lessons learned with the broader HCS team and with other communities in their state. For example, one community may have discovered an effective channel for reaching health care providers. The research sites can then suggest that channel to other communities who are struggling to reach the same audience.
5. **Adjusting Implementation and Distribution Plans.** Finally—and perhaps most importantly—campaign assessments provide research sites and communities with the information they need to update their distribution plans and implementation activities. The most effective campaigns rely on a continual feedback loop, constantly adjusting strategies and tactics based on evidence of their effectiveness.

» HOW?

This playbook outlines three steps, which include identifying data sources, preparing discussion questions, collecting data through quantitative and qualitative methods, and adapting campaign distribution plans based on the assessment findings.

Be sure to review this playbook each time you conduct a campaign assessment to make sure you're following established process and providing communities with tools they need to effectively evaluate their progress.

STEP 1: PLAN

The campaign assessments should include two different types of information—quantitative metrics and qualitative feedback. Quantitative metrics—such as number of materials distributed or visits to the community webpage—help to demonstrate the reach and influence of the campaign. Qualitative feedback—especially from coalition staff and community stakeholders—offers insight into why certain strategies, channels, and activities were selected by communities and provides important context for the quantitative results.

IDENTIFY YOUR DATA SOURCES

For quantitative metrics, start by identifying the available data sources and how to access them. These sources likely include:

- Webpage metrics (e.g., number of visits, unique visitors, time spent on page, referral source)
- Social media metrics (e.g., advertisement/post views, advertisement/post engagement)
- Coalition records–Hardcopy materials (e.g., distribution channels, number of materials distributed)
- Coalition records–Digital materials (e.g., distribution platforms, number of posts, duration of posts)

Webpage metrics can be obtained from the data coordinating center. Social media metrics can be obtained from the organization whose account was used to post the ad or information. Coalition records may best be obtained by asking the coalition leader to fill out a short form or survey with the needed information.

PREPARE YOUR QUESTIONS

For qualitative feedback, start by selecting the questions that you wish to ask coalition staff and community stakeholders. Sample questions from the Communities That HEAL intervention manual are summarized in ***Exhibit 1***.

Next, think about which questions should be asked of which individuals. For instance, some questions may be more appropriate to ask coalition members, whereas other questions would be better asked of partner organizations or community opinion leaders. In all cases, customize the questions so they are relevant for the individuals providing feedback and are likely to elicit meaningful information.

EXHIBIT 1. DISCUSSION QUESTIONS FOR CAMPAIGN ASSESSMENT

DOMAIN	QUESTION
Campaign Assets	What coalition or community assets have been accessed? Which are useful for reaching different priority groups? What comments and feedback have coalition members, partner organizations, and research sites received about the <u>content</u> of campaign materials (especially from community leaders, providers, and people with lived experience)?
Campaign Distribution and Communication Channels	Which communication channels (e.g., radio, television, social media) have been used to disseminate the campaign? Which channels should be a priority for extending campaign frequency and effectiveness? What comments and feedback have coalition members, partner organizations, and research sites received about the <u>placement</u> of campaign materials (especially from community leaders, providers, and people with lived experience)? Who is involved in distributing the communications campaign (e.g., HCS staff, coalition, outside stakeholders)?

Stakeholder and Partner Coordination	Are there new opportunities to coordinate message dissemination with other Communities that HEAL (CTH) intervention activities? What about opportunities to coordinate message dissemination with efforts to address the opioid crisis external to CTH? How well is the campaign focusing on, reaching, and coordinating with community service providers (e.g., health care, criminal justice, and other settings) who help prevent, screen for, treat, and support recovery from opioid use disorder? Do subsequent communications campaigns need to align with campaigns implemented by other coalitions or state/national organizations to help reduce opioid overdose deaths and stigma, or increase demand for prevention, screening, treatment, and recovery services?
Campaign Fidelity, Reach, and Influence	How well are the strategies listed in the distribution plan being implemented? How well is the campaign reaching, influencing, or engaging people in a position to improve access to and availability of naloxone and medications for opioid use disorder?

ENGAGE COMMUNITY COALITIONS

Once you know what information is needed to complete the campaign assessment, engage the community coalitions in the assessment process. Ask them to review the proposed data sources and quantitative metrics, as they may know of other sources or metrics that should be included. Ask them to review the proposed feedback questions (***Exhibit 1***) and work with them to identify individuals who can provide insightful answers to these questions.

The earlier you engage coalition members in the process, the stronger your assessment will be, and the more open communities will be to adapting their campaign distribution plans based on the assessment findings.

STEP 2: IMPLEMENT

Now that you have a plan for conducting your campaign assessment, it's time to put it into action. Work closely with coalition members to collect and organize all needed information. Then, if time permits, bring together key coalition members and community stakeholders to conduct two additional activities:

(1) SWOT Assessment. Take stock of the campaign's advantages and limitations by conducting a SWOT assessment. This will help you understand both the internal and external barriers facing the campaign.

(2) Start, Stop, Continue Exercise. Identify campaign tactics and activities that are working well, not working well, and missing. This will help you turn the assessment findings into actionable recommendations.

COLLECT QUANTITATIVE METRICS

Work with the data coordinating center and coalition staff to collect the metrics that you selected during the planning phase of the assessment. Be sure to organize the metrics chronologically (e.g., by week or month) so you can identify any trends in campaign activities or audience engagement, such as peak periods of audience response. If possible, compare the metrics and identify any relationships between them (e.g., Facebook social media posts led to a marked increase in webpage visits). By triangulating these metrics, you can start to identify the campaign activities that are most impactful. A template for collecting quantitative metrics is included as ***Appendix A***.

COLLECT QUALITATIVE FEEDBACK

Schedule interviews, focus groups, or other gatherings to collect qualitative feedback from coalition members and other stakeholders, using the questions you selected during the assessment planning phase. Keep these feedback sessions simple and avoid making them overly formal, as you want participants to feel empowered to share candid, honest feedback on the campaign. Nevertheless, be sure to schedule sufficient time for each session and ask participants to give you their full attention.

Here are some tips for facilitating effective feedback sessions:

- **Ensure Visual Interaction.** Whenever possible, conduct sessions via video (rather than by phone). When individuals see one another, they are less likely to multitask and more likely to be engaged in the session. (In some locations, it may be feasible to conduct in-person sessions. However, check that local laws permit in-person gatherings and that all attendees are comfortable gathering in the same space).
- **Block Sufficient Time.** Avoid the temptation to squeeze the feedback sessions into otherwise busy days. Be sure to allot at least 30 minutes for each session (more if possible) and ensure that all participants can stay for the entire time.
- **Segment Participants.** Different participants will have different perspectives on the campaign. So they can speak freely, schedule separate sessions for different types of participants. For example, schedule one session for coalition staff, another session for community partners, and another for key opinion leaders.
- **Take Detailed Notes.** Finally, be sure to capture all the rich information that you obtain from each feedback session. Audio recording each session is ideal, but not all participants may feel comfortable with that approach. At a minimum, have a dedicated notetaker document the feedback that you receive using an electronic file.

CONDUCT SWOT ASSESSMENT OF CAMPAIGN ACTIVITIES

Successful campaigns regularly conduct SWOT analyses to understand the internal and external factors that likely contribute to the campaign's success. Strengths and weaknesses are internal factors over which the campaign has control (e.g., campaign assets, staffing, distribution channels). Opportunities and threats are external factors that are outside the campaign's control but might influence its success (e.g., presence of similar campaigns, cost of paid advertising).

The easiest way to conduct a SWOT analysis is to create a 2x2 grid—with one cell representing each of the four elements—and to populate the grid through collective discussion with coalition members. A sample SWOT analysis grid with example content is depicted in ***Exhibit 2***. Additional SWOT analysis templates are also available online.

EXHIBIT 2. SAMPLE SWOT ANALYSIS

STRENGTHS	WEAKNESSES
Guiding Questions: What are you doing well? What resources can you draw on? What do others see as your strengths?	**Guiding Questions:** What could you improve? Where do you have fewer resources than others? What do others see as weaknesses?
▪ Large number of distribution channels ▪ Strong buy-in from community leaders ▪ Creative local customization of campaign materials ▪ Input from local residents with lived experience	▪ Over-emphasis on community leaders ▪ Limited engagement with health care providers and community residents

OPPORTUNITIES	THREATS
Guiding Questions: What opportunities are open to you? What trends can you take advantage of? How can you turn your strengths into opportunities?	**Guiding Questions:** What threats could harm the campaign? What is the “competition” doing? What threats do your weaknesses expose you to?
▪ Local hospital recently started detox and treatment programs for region ▪ Community government has strong web presence frequently visited by community members ▪ Statewide campaign on combating opioid use has already identified naloxone distribution sites in each county	▪ Very few naloxone distribution sites are in county ▪ Pandemic has limited ability to distribute hardcopy materials at local events ▪ Rural areas of county have limited Internet access, reducing exposure to digital campaign activities

COMPLETE START, STOP, CONTINUE EXERCISE

Once the campaign assessment has collected data and conducted a SWOT analysis, the next step is to translate that information into actionable recommendations. The Start, Stop, Continue exercise is an easy way to bring together coalition members and summarize those recommendations.

Essentially, the exercise challenges individuals to identify three sets of campaign activities:

- **Start =** Activities that are currently missing from the campaign but would add value. These activities should be started and integrated into the campaign. (Suggestions for Start activities might be based on qualitative feedback or SWOT opportunities/weaknesses.)
- **Stop =** Activities that are part of the current campaign but are providing limited value, especially if they are resource intensive. These activities should be stopped and eliminated from the campaign. (Suggestions for Stop activities might be based on quantitative metrics and qualitative feedback.)
- **Continue =** Activities that are part of the current campaign and provide sufficient value, especially relative to their effort. These activities should continue to be part of the campaign and may even need to be given higher priority. (Suggestions for Continue activities might be based on quantitative metrics, qualitative feedback, and SWOT strengths.)

The easiest way to conduct this exercise is to create three columns—one for each category—and populate them through collective discussion with coalition members. A sample exercise with example content is depicted in ***Exhibit 3***.

EXHIBIT 3. SAMPLE START, STOP, CONTINUE EXERCISE

START	STOP	CONTINUE
▪ Work with local hospital to promote new treatment program, providing a link to this resource from the community’s webpage. ▪ Secure buy-in from local officials to feature digital campaign materials on local government website. ▪ Engage community residents in the campaign, ensuring that their voices are reflected in campaign activities.	▪ Discontinue providing links to statewide naloxone distribution sites, as residents find the list overwhelming. Instead, list only local distribution sites. ▪ Postpone distributing hardcopy materials until local businesses open more fully.	▪ Distribute materials through digital channels, which effectively reach many community residents. ▪ Encourage individuals to check naloxone distribution site hours before traveling to the site. ▪ Engage with community leaders and ask them to share personal stories about individuals who have been saved by naloxone. ▪ Write monthly letters to the editor in the local newspaper.

STEP 3: ADJUST

SUMMARIZE YOUR FINDINGS

Be sure to summarize the assessment findings in a brief report. These lessons learned will be critical not only for adjusting the current campaign, but also for ensuring that future campaigns take advantage of what you've learned. A template for summarizing the campaign assessment findings is included as ***Appendix B***.

UPDATE YOUR DISTRIBUTION PLAN

With the campaign assessment complete, it's time to update the community's campaign distribution plan based on the assessment findings. The SWOT analysis and Start, Stop, Continue exercise should have provided you with concrete action items that can be incorporated easily into the revised distribution plan. These actions may include updating or removing campaign tactics, identifying new distribution channels, selecting new leaders/champions for each tactic, or identifying new priority groups to target.

SCHEDULE THE NEXT ASSESSMENT

Now that the campaign assessment is complete and the distribution plan is updated, you should capitalize on this momentum to schedule the next campaign assessment. In addition, be sure to work with coalition members to reflect on the current assessment—what worked well, what could be improved—to refine and streamline the process for future assessments.