

# Planning & Marketing Guide

*For Implementing Stanford Self-Management Workshops*

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## Introduction

This document is intended to aid organizations, coordinators, master trainers, and facilitators implementing Stanford's Self-Management Workshops. In Arizona, these workshops are known as Healthy Living. Stanford self-management programs offered through the Arizona Living Well Institute and its partners include: **Healthy Living, Healthy Living with Diabetes, Healthy Living with Chronic Pain, Tomando Control de Su Salud, and Programa de Manejo Personal de la Diabetes.** This worksheet may be used by new partners and those who have already implemented program.

This document includes key elements for successfully developing, implementing and maintaining an effective recruitment and marketing effort. It may be used to help agencies schedule and promote workshops long term or short term. It may be used in conjunction with other marketing tools and resources.

This tool has been broken down into five sections to assist organizations in the implementation of workshops. The first four sections: **Target Audience, Planning and Logistics, Gathering Resources, and Messaging**, should be addressed prior to beginning of the workshop. The final section, **Post-Workshop Assessment**, should be filled out after the workshop is completed.

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## Target Audience

It is important to begin any implementation effort by identifying the audience you would like to reach, as this affects all other areas of the implementation process. Target groups may be identified by any of the following:

- Age range
- Community of residence
- Race or ethnicity
- Chronic condition
- Income
- Other shared elements

Your target audience may include a combination of these factors.

Who is your target audience?	
Where do they live?	
What do they care about?	
Where do they congregate?	
Where do they get their information?	
What are the cultural considerations that must be taken into account with their group?	
Identify other considerations.	

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## Planning and Logistics

### Location

Choosing a location includes assessing the physical space as well as in-house or local support. Look for an advocate who knows the community and its residents and will promote the workshops. To making sure the facility is appropriate, consider:

- ADA accessibility
- Space for 12-20 people
- Privacy and quiet
- Parking
- Tables and chairs
- Sound quality
- Sufficient bathrooms
- Room set up (U or square shape)
- Room temperature
- White board or easel

	Site A	Site B
Location		
Contact		
Is this location available for 6-7 consecutive weeks at the same time?		
Are there potential conflicts with the site (e.g. facilities maintenance, conflicting events)?		
What are the benefits of site (e.g. champion, familiarity or proximity to audience, perks)?		
Is there a fee for use? What does the fee cover?		
Identify other considerations.		

*Available tools: Letter of agreement with potential site*

## Scheduling

When planning your schedule, take into account the needs of your audience, needs of your facilitator and requirements of the program. Workshops should be scheduled for six consecutive weeks with no breaks. Consider:

- Day of week
- Seasons
- Competing activities
- Time of day
- Holidays

Does your audience or facilitator have limitations or preferences for time of day or day of the week?	
Are there competing activities, events or holidays coming up?	
When will you be ready for your first session? Allow 6-8 weeks for marketing and recruitment.	
Are you scheduling a presentation or “class zero”?	
Identify other considerations (e.g. season, work schedules, promotional opportunities).	

*Available tools: Scheduling Self-Management workshops*

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## Gather Resources

### People power

Who will facilitate?	
Do facilitators reflect and relate to target community (e.g. age, race/ethnicity, gender, chronic condition)?	
Who will lead marketing and promotion?	
Who will take registrations and follow up with participants?	
Who will be responsible for compiling and submitting reports and other paperwork?	
Who are other potential partners and champions?	

### Workshop materials

Are all materials available (e.g. books, markers, charts, easel)?	
If not, how will you get them?	
How will you provide books to participants (e.g. free, loan, fee)?	
Will refreshments be available?	
Identify potential sponsors or in-kind donations for books or refreshments.	

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# Messaging

## Reflect your audience

Tailor the content and format of messages to your audience. What will be the most appropriate font size, literacy level, preferred language and images to fit the target audience? Consider:

- Race/ethnicity
- Gender
- Economic indicators
- Age range
- Urban/rural setting

## Individualize the invitation

Personal contact from a known and/or trusted individual is ideal. Keep facilitators involved in individual and group marketing efforts.

Who can carry your message?	
How will personal contact be carried out (e.g. blood pressure clinics, referral forms linked to medical visits)?	

## Present to groups

Consider promoting your workshop with presentations to groups, such as:

- Health care providers
- Government
- Community and other not-for-profit organizations
- Disease or condition support groups
- Religious organizations

## Linked to other programs

Health fairs and community lunches are just two of the many piggybacking opportunities.

## **Use predesigned materials**

Sample flyers, brochures, letters and other marketing materials are available on the Arizona Living Well Institute's website. A list of links to key resources is in the Appendix of this document.

## **Keep written messages clear**

Use words that resonate best with potential CDSMP participants, such as:

- *Feel better.* CDSMP can increase your energy and help you get relief from pain, fatigue, and anxiety
- *Take control of your life.* CDSMP helps you do the things you want to do each day
- *Get connected.* CDSMP workshops give you the opportunity to learn from others who have similar health issues
- Use “ongoing health condition” rather than “chronic disease.”
- Use “workshops” rather than “classes.”

## **Stay in contact with registrants**

Strategies to communication with potential and registered participants include:

- Follow-up phone calls
- Confirmation letters

## **Use a mix of materials and media**

Written materials may include:

- |                              |                      |                           |
|------------------------------|----------------------|---------------------------|
| ■ Community calendar notices | ■ Posters            | ■ Newspaper announcements |
| ■ Newsletter stories         | ■ Recruiting letters | ■ Radio                   |
| ■ Brochures                  | ■ Email blasts       | ■ TV                      |
|                              | ■ Social media       |                           |

For all calendar and media contacts, keep in mind the substantial lead-time needed.

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## Post-Workshop Assessment

This section is intended to be an objective assessment of the areas of strength and those in need of improvement.

How many participants attended at least one session?	
How many participants attended four or more sessions?	
If attrition rate was more than 30%, what factors contributed to the loss of participants during the workshop?	
What actions, if any, would improve attendance at this workshop in the future?	
What were the strengths of this workshop effort?	
What would you do differently next time?	
What would you do the same?	
Identify other considerations.	