

# My Plan

Use this template to record the information pertinent to each step of the planning process. Click on the appropriate link from the list below to go to the step in MyPlan. **Note: Once the answers to the guiding questions are reflected in the outcome step, the instructions and guiding questions can be deleted to save space if you wish.**

To create a table of key program decisions about Target Audience, Behavior Change, Exchange/Benefits, Strategy, Intervention Activities and Tactics, go to the **My Model** document.

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Step 6.3- Execute and manage the monitoring and evaluation plans.

Step 6.4- Modify intervention activities, as feedback indicates.

## Phase 1: Problem Description

### Step 1.1- Write a problem statement

a. Guiding questions:

- What should be occurring? (desired behavior)
- What is occurring? (problem)
- Who is affected and to what degree?
- What could happen if the problem isn't addressed?

b. Outcome of this step:

Statement of the problem to be addressed.

### Step 1.2- List and map the causes of the health problem

a. Guiding questions:

- What are the causes of the health problem?
  - Direct
  - Indirect
- What are the risk factors?
- What are the protective factors?

b. Worksheet:

#### Health Problem Analysis Worksheet

Indirect Contributing Factors	Direct Contributing Factors	Risk/ Protective Factors	Health Problem
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Worksheet elements to copy and paste:

<div style="border: 1px solid black; width: 100px; height: 40px;"></div>	<div style="border-top: 1px solid black; width: 80px; margin: 0 auto; text-align: center;"> </div>
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c. Outcome of this step:

List of health problem causes categorized as direct and indirect, and as risk and protective factors organized in a logical sequence.

### **Step 1.3- Identify potential audiences**

a. Guiding questions:

- Who is most affected by the problem?
- Who is most likely to change their behavior?
- Who is most feasible to reach?
- What are the key secondary audiences?

b. Outcome of this step:

Two or three potential audiences.

### **Step 1.4- Identify the models of behavior change and best practices**

a. Guiding questions:

- Which theories appear to have determinants of behavior that match the causal factors you identified in Step 1.3 and why?
- What has worked with similar audiences in the past based on your review of other programs?

b. Outcome of this step:

A summary of the theories and best practices that you will use.

### **Step 1.5- Form your strategy team**

a. Guiding questions:

- What are the required roles?
- Who can help with financial and political issues within the organization?
- Who are the external partners most critical to get on board?

- What organizational structure will be used?
- What communications approaches will be used?

b. Worksheet:

Team Member	Affiliation	Role
Decision-making process:		
Communication process:		

c. Outcome of this step:

The names of your team members, their affiliations, and their roles and brief descriptions of your communication and decision-making processes

**Step 1.6- Conduct a SWOT analysis**

a. Guiding questions:

- How relevant is the problem to your organization’s mission/goals?
- Where does the problem fit in your organization’s priorities?
- What knowledge is available to ameliorate the problem, and do you have access to that information?
- What is the state of relevant technology?
- Are the human, technical and financial resources you need to address the problem available?
- What activities can you do in-house?
- What activities will you need to contract for, and what challenges are presented by the contracting process?
- What work is already underway to address the problem, and who is doing that work?
- What gaps exist?
- What political support and resistance surround the problem?
- What organizations or activities that affect the problem indirectly (that work “upstream” in your health problem analysis could be potential partners?
- Are there ethical concerns associated with any of the possible interventions?

b. Worksheet:

SWOT worksheet

<b>Factors/Variables</b>	<b>Internal</b>	<b>External</b>
<b>Positive</b>	Strengths	Opportunities
<b>Negative</b>	Weaknesses	Threats

c. Outcome of this step:

The strengths, weaknesses, opportunities and threats identified, along with any ethical barriers to adopting particular interventions in your community. Also, a summary of eliminated approaches and ones that appear to be more attractive based on the SWOT analysis.

## **Phase 2- Market Research**

### **Step 2.1- Define your research questions**

#### a. Guiding questions:

- What gaps or assumptions are there in your Phase 1 analysis?
- What questions are suggested by the theory (ies) of behavior change you are choosing for guidance?
- What questions do you have about applying best practice to your specific target audience and situation?
- What questions do you have about benefits, barriers and competition for some behaviors you may want to target?

#### b. Outcome of this step:

List of research questions (divide them into nice to know and need to know)

### **Step 2.2- Develop a market research plan**

#### a. Guiding questions:

- Which of the research questions developed in Step 2.1 can be answered using secondary sources and which ones require collecting new (primary) data
- Will you be using qualitative or quantitative methods to answer your primary research questions and if so which ones specifically?
- In what order will you conduct your formative studies?

#### b. Outcome of this step:

Market Research Plan

### **Step 2.3- Conduct and analyze market research**

#### a. Guiding questions:

- Who will carry out each major component of the market research plan you crafted in the previous step?
- What are their roles and responsibilities?
- If needed, who will be the lead researcher?
- How will you tabulate and analyze the data?

b. Outcome of this step:

Market research analysis

**Step 2.4- Summarize research results**

a. Market research results summary worksheet:

Executive Summary	
Introduction	
Methodology	
Results	
Conclusions and Recommendations	

b. Outcome of this step:

Market research results summary

## Phase 3- Market Strategy

### Step 3.1- Select your target audience segments

#### a. Guiding questions:

For each of the potential segments, answer the following questions using information from your research findings:

- What are their aspirations?
- What are the benefits of the target behavior valued?
- What are the competitive behaviors practiced?
- What information channels are used?
- What is their level of readiness for change?

Which segments that have the following?

- Perceived benefits that are easy to build into an exchange
  - Competing behaviors against which you can “win”
  - The largest number of people reachable at the smallest cost
  - The greatest readiness to change
- 
- Based on the characteristics and concerns of secondary audiences (influentials) in your Phase 2 research, does the amount of influence they have merit devoting program resources to reaching them as a distinct audience segment?

#### b. Outcome of this step:

List of primary and secondary target audience segments refined from the list created in Step 1.2 using the results of the research done in Phase 2.

### Step 3.2- Define current and desired behaviors for each audience segment

#### a. Guiding questions:

- What behaviors are the audience segments you have chosen currently engaged in?
- Which of these behaviors could be changed in the short-run?
- Is it likely to change them with a little more incentive? If audience members take the desired action, will it make a tangible difference in achieving your overall program goal?

To narrow your list down to the final priorities, answer these questions about the following factors for each audience/behavior pair:

Risk

- Is the target audience segment currently practicing risky or unhealthy behaviors?
- How serious is the risk?

### Impact

- Does the new (desired) behavior reduce risk?
- Will addressing this audience/behavior have a useful, lasting impact on the problem?
- How effective will the proposed behavior be at reducing overall negative outcomes or improving positive ones?
- Is the audience/behavior being effectively addressed by anyone else?

### Behavioral Feasibility

- Is the audience likely to adopt the behavior? Is the current behavior seen as a problem? How ingrained or “rewarding” are the current or competing behaviors?
- How costly is it (time, effort, resources) for the audience segment to perform the behavior?
- How complex is the behavior (does it involve few or several elements)?
- How frequently must the behavior be performed?
- How compatible is the proposed behavior with the audience’s current practices (is the behavior socially approved)?
- Are there major barriers to engaging in the desired behavior? What information, skills, resources and/or access must the audience segment acquire to overcome the barriers and make the desired behavior change?
- Are there at least some members of the segment (“doers”) who manage to do the desired behavior? Do they have unusual characteristics?

### Resource Feasibility

- How effectively can we reach this audience segment given our available resources?
- How effectively can we influence their behaviors given our available resources?
- Can this audience/behavior be addressed within the timeframe of the initiative or does it require an ongoing effort?

### Political Feasibility

- Will the community (or other important stakeholders) support this audience/behavioral objective?
- Does your organization support the choice?

#### b. Worksheet:

Utilize the interactive Health Intervention Comparison Wizard provided for this step in CDCynergy.

#### c. Outcome of this step:

Descriptions of current and desired behaviors for each audience segment

### **Step 3.3- Describe the benefits you will offer**

a. Guiding questions:

- What do your audience research findings show that the target audience wants?
- What do audience members say they value the most?
- What are you asking them to do?
- What they'll get in return?
- Does the exchange you are proposing meet the following criteria?
- Easy-to-irresistible to accept ?
- Maximizes the benefits they will get for adopting a behavior?
- Minimizes any barriers that might deter them?

b. Worksheet:

Exchange Worksheet

<b>Audience member gives:</b>	<b>Audience member gets:</b>
<b>Social Marketer gets:</b>	

c. Outcome of this step:

Description of the benefits that will be offered.

### **Step 3.4- Write your behavior change goal**

a. Guiding questions:

- Who?
- Will do what?
- Under what conditions?
- In exchange for?

b. Outcome of this step:

Behavior change goal write-up

### **Step 3.5- Select the intervention(s) you will develop for your program**

a. Guiding questions:

- What interventions do you propose to develop?

- Communication about facts and benefits
- Providing or improving a service
- Developing or adapting a product
- Changing policy through advocacy and community mobilization to reduce barriers to service

b. Outcome of this step:

List of interventions to be developed

### **Step 3.6- Write the goal for each intervention**

a. Guiding questions:

- How will each intervention work to influence the audience to adopt the new behavior?

b. Outcome of this step:

Description of in goals for the interventions

## **Phase 4- Interventions**

### **Step 4.1- Select members and assign roles for your planning team.**

#### a. Guiding questions:

- Should your current team's composition be supplemented or reconfigured to incorporate the intervention planning skills contacts or other resources needed for this phase that your current strategy team lacks?
- What additional representation do you need on your team in terms of groups that you want to reach, and technical, managerial, and creative expertise?

#### b. Outcome of this step:

List of planning team members and descriptions of their roles.

### **Step 4.2- Write specific, measurable objectives for each intervention activity.**

#### a. Guiding questions:

What are the short-term, intermediate and long-term outcome objectives for each intervention goal that you set in Phase 3?

#### b. Outcome of this step:

The short-term, intermediate and long-term outcome objectives for each intervention goal.

### **Step 4.3- Write a program plan, including timeline and budget, for each intervention.**

#### a. Guiding questions:

- What are the activities, timing, scope and quality of each intervention and the size and nature of the target audience that will be exposed to it?

#### b. Outcome of this step:

The delivery/reach objectives, timeline and budget for each intervention

**Step 4.4- Pretest, pilot test, and revise as needed.**

a. Guiding questions:

- What is your plan to create and test your concepts, products, distribution channels, materials and messages?
- What are the revisions that will be made based on the testing of the items above?

b. Outcome of this step:

Testing plan and recommended revisions based on the outcomes of the testing.

**Step 4.5- Summarize your program plan and review the factors that can affect it.**

a. Guiding questions:

- What are the factors that can affect your program plan?

b. Outcome of this step:

List of the factors that can affect your program plan.

**Step 4.6- Confirm plans with stakeholders.**

a. Guiding questions:

- Do your stakeholders support your intervention plans?
- Have you secured stakeholder agreements?

b. Outcome of this step:

Secured stakeholder buy-in and support.

## **Phase 5- Evaluation**

### **Step 5.1- Identify program elements to monitor.**

a. Guiding questions:

- Which program elements will you monitor?

b. Outcome of this step:

List of program elements to monitor

### **Step 5.2- Select the key evaluation questions.**

a. Guiding questions:

- What evaluation questions will you address?

b. Outcome of this step:

List of evaluation questions.

### **Step 5.3- Determine how the information will be gathered.**

a. Guiding questions:

- What information sources and data collection methods will you use for monitoring and evaluation?
- What evaluation research design will be used?

b. Outcome of this step:

Description of information sources, data collections methods and research design.

### **Step 5.4- Develop a data analysis and reporting plan.**

a. Guiding questions:

- How will the data for each monitoring and evaluation question will be coded, summarized and analyzed?
- How will conclusions be justified?
- How will stakeholders both inside and outside the agency will be kept informed about the monitoring and evaluation activities?
- When will the monitoring and evaluation activities be implemented and how will they be timed in relation to program implementation?
- How will the costs of monitoring and evaluation be presented?  
How will the monitoring and evaluation data will be reported?
- What are your monitoring and evaluation timelines and budgets?

b. Outcome of this step:

A data analysis and reporting plan

## **Phase 6- Implementation**

### **Step 6.1- Prepare for launch.**

#### a. Guiding questions:

- Have you received organizational clearance for use of program materials?
- What level of quality can you afford to produce them in the amounts needed to support your program activities?
- If you plan to issue requests for proposals (RFPs) have they been prepared and what is your schedule for issuing and reviewing them?
- Have you hired new staff or consultants as your program plan requires?
- Have you trained your staff to prepare them for the launch of your intervention activities?
- Do you need a plan for rolling out different intervention components at different times?

#### b. Outcome of this step:

Launch preparations and plan.

### **Step 6.2- Execute and manage intervention components.**

#### a. Guiding questions:

- When is your launch date and how will you manage and publicize it?
- How will you manage program activities and personnel?
- What will be your approach to taking advantage of unforeseen opportunities that arise and integrating lessons learned?

#### b. Outcome of this step:

Execution and ongoing management of intervention components.

### **Step 6.3- Execute and manage the monitoring and evaluation plans.**

#### a. Guiding questions:

- What is the ongoing status of your program progress, monitoring and evaluation activities, feedback and lessons learned?

b. Outcome of this step:

Summary of monitoring and evaluation results.

**Step 6.4- Modify intervention activities, as feedback indicates.**

a. Guiding questions:

- What modifications are needed to the interventions based on the results of your monitoring and evaluation activities?

b. Outcome of this step:

Recommendations for modifications to intervention activities.