Planning Promotional Programs and Seeking Funding Resources

Contents

Planning Promotional Programs and Seeking Funding Resources

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Planning health promotion programs – Worksheets/Workplans

Understand the Context Worksheet

1. Why are you going through a planning process at this particular time?

2. Are you modifying an existing plan or starting a new plan?

3. What if anything, has already been decided? For example have you decided on audiences, issues, settings, strategies, or activities?

4. What kind of content must be included in your plan? For example, is there a template or form provided from your potential funder?

5. Are there any other circumstances or expectations that may affect how you must carry out your planning process?

6. What time will be available to implement the program that you plan (including development, after planning ends)?

7. What financial resources (dollars) will be available to implement the program that you plan?

8. Are there any other circumstances or expectations that may affect your final program?

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Identify stakeholder roles and expectations

- Who should be involved?

  Name:
  Interest in program/process:
  Degree of involvement:
  Details of involvement:
- In general, to what degree should the stakeholder be involved in the planning process?

  ❏ Peripheral (needs to be kept informed)
  ❏ Supportive (provides some form of support)
  ❏ Involved (frequently consulted or part of the planning process)
  ❏ Core (on the planning team)

- How will you specifically involve this stakeholder in the planning process in a meaningful way?
- What overall expectations do stakeholders have in terms of the degree of rigour and evidence that will be incorporated into the planning process?

  ❏ High ❏ Medium ❏ Low

- What overall expectations do stakeholders have in terms of the need for new data (versus compilation of existing data) to inform decisions throughout the planning process?

  ❏ High ❏ Medium ❏ Low

- What other details are there regarding stakeholder expectations about degree of rigour, evidence and need for new data to inform planning decisions?
- How will decisions be made within the core planning group?

  ❏ Manager veto
  ❏ Consensus
  ❏ Another decision-making process
  ❏ Majority rules of whoever is present

- How, specifically, will the decision-making process work within the core planning group?
- How will decisions be made outside of the core planning group? For example, are there situations when subcommittees will make decisions or individuals will make decisions?

Identify stakeholder roles and expectations

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Assess resources for planning

1. What staff are available to participate in the planning process? What is their approximate available time, and do they have any specific expertise or interests?

2. Are volunteers available to aid in the planning process? If so, how? What is their approximate available time, and do they have any specific expertise or interests?

3. What staff are available to participate in the planning process? What is their approximate available time, and do they have any specific expertise or interests?

4. What partners are available to participate in the planning process? What is their approximate available time, and do they have any specific expertise or interests?

5. What funds are available to support the planning process? Are these funds tagged for a specific purpose?

6. What in-kind contributions are available to support the planning process?

7. What kind of equipment or space is available to support the planning process?

8. When can planning begin?

9. When will planning end?

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Develop a workplan for the planning process

1. What is the planning task you would like to add to your workplan?

   [ ]

   Enter tasks and steps that relate to the 6-step planning process. For example:

   Gather data for situational assessment (worksheet 2.1)
   Analyse and interpret data (2.2-2.4)
   Consider how to proceed with planning (2.5)
   Choose goals and audiences (3.1)
   Develop outcome objectives (3.1)
   Choose broad program strategies (4.1)
   Brainstorm activities (outputs) (4.1)
   Assess and analyse activity options (4.2)
   Make final activity (output) choices (4.2)
   Assign resources to chosen activities (4.3)
   Develop process objectives for activities (4.4)
   Choose indicators of success (5.1-5.2)
   Review and revise overall plan (6.1)

2. Who is responsible (lead) for this task?

   [ ]

3. Who will consult and/or otherwise support the lead on this task?

   [ ]

4. How much time (in total days or total hours) is allocated to this task?

   [ ]

5. When is the deadline for this task?

   [ ]

6. What are the dollars required for this task?

   [ ]

7. What other resources are required for this task?

   [ ]

8. Who will approve the work done related to this task?

   [ ]

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Develop a data gathering plan

1. What are your research questions?

   [ ]

2. What method will you use to collect your data?

Impact
Best practices' synthesis and guidelines
Community health status indicators
Community stories/testimonials
Cost-benefit data
Environmental Scan
Quantitative polling/survey data
Evaluation findings
Other type of data

3. What data source(s) will give you the information you want? (Choose one or more than one as appropriate)

   ❏ Consultation (face to face) using individual interviews, focus groups, and/or forums
   ❏ Large data sets
   ❏ Literature searches and reviews, including systematic reviews
   ❏ Other

4. . What data source(s) will give you the information you want? (Choose one or more than one as appropriate)

   ❏ Community service organizations
   ❏ Polling companies
   ❏ Community spokespersons
   ❏ Public libraries
   ❏ Consultants
   ❏ Websites
   ❏ Resource centres such as THCU
   ❏ Researchers
   ❏ Government departments
   ❏ Private sector
   ❏ Canadian Best Practices Portal, Database of Effective Interventions
   ❏ Other source of data?

5. How, specifically, will you complete this data collection task?

   [ ]

Develop a data gathering plan

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6. Who is responsible (lead) for this data collection task?

7. Who will consult and/or otherwise support the lead on this task?

8. How much time (in total days or total hours) is allocated to this task?

9. When is the deadline for this task?

10. What are the dollars required for this task?

11. What other resources are required for this task?

Summarize the situation

1. What is the situation? What are the trends (e.g., size, growth), public perception, and stakeholder concerns that describe the situation?

2. What is the situation (continued).

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List possible actions

1. What possible action might be taken to address this situation?

2. Where did the idea for this possible action come from?

3. What are further details about this possible action?

4. What information do you have about evidence of effectiveness for this possible action?

Consider how to proceed

1. What are the gaps in data quality or quantity, relative to stakeholder expectations, that may restrict your ability to make evidence-based decisions about goals, audiences, objectives, strategies, activities and resources?

2. What is your current perception about your ability to have an impact on the situation with available time, financial resources and mandate?

3. What are your next steps in the planning process? Will you proceed now, or must you revisit research questions, project scope or resources?

List possible actions

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Set goals, audiences, and outcome objectives

1. What is your goal?

   [ ]

2. Which audiences will require special attention to meet your goal?

   [ ]

3. Who do you want to change? That is, who is your audience?

   O Parents within X community
   O Parents
   O Children
   O Teachers
   O Adults
   O Women
   O Seniors
   O Men
   O Childcare providers
   O Community decision-makers
   O Workplace decision-makers
   O Physicians
   O Municipal
   O School
   O Workplace
   O Regional
   O Provincial

4. What do you want to change to help you reach your goal?

   O beliefs
   O knowledge (who know how to)
   O who have talked with a friend/neighbour/family member about
   O rates of participation
   O volunteer rates
   O feelings of support
   O behaviours
   O intention to change
   O awareness
   O thoughts about a topic
   O level of confidence
   O knowledge (who understand that)
   O perceptions of social pressure
   O level of comfort talking to friends/family about a topic
   O level of agreement that change is needed
   O habits
   O a law
   O policies

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5. Please provide details about the change you desire (as indicated above).

6. In what direction do you want to affect change?

7. How much change do you hope to achieve?

8. By what month do you plan on achieving this change?

9. By what year do you plan on achieving this change?

11. Is this a short, medium or long-term objective?

- ○ Short-term
- ○ Medium-term
- ○ Long-term

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Choose strategies and brainstorm activities

1. Create supportive environments - add potential activities

2. Build healthy public policy - add potential activities

3. Health Communication - add potential activities

4. Self-help/mutual support - add potential activities

5. Community mobilization - add potential activities

6. Develop personal skills - add potential activities

7. Education/information - add potential activities

8. Strengthening health services - add potential activities

9. Other strategy (please specify)

Choose strategies and brainstorm activities

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Assess and choose activities

1. Potential Activity

    | |
    | |

2. Check this box to include this activity as part of your program.

    ❏ Include

3. Strategy

    | |
    | |

4. What do you know from the available evidence about the expected effectiveness of this activity for meeting your outcome objective(s)?

    | |
    | |

5. What do you know from the available evidence about the appropriateness of this activity for your intended audience(s)?

    | |
    | |

6. What do you know about the financial and human (skills, time) resources required to implement this activity properly?

    | |
    | |

7. What resources, both human and financial do you have available to implement this activity? How does that compare to what resources are required to implement it properly?

    | |
    | |

8. What resources, both human and financial, will you allocate to this activity

    | |
    | |

Assess and choose activities

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Assign outcome objectives

1. Activity code

2. What will you do or produce?

3. Who will you be doing or producing these things for?

4. How many will you do or produce?

5. What month will you accomplish this by?

6. What year will you accomplish this by?

Assign outcome objectives

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Develop outcome indicators

1. Activity code

2. What will you measure?

3. Where is the data available?

4. Are there any concerns about the reliability of this indicator?

5. Are there any concerns about the validity of this indicator?

6. Are there any limitations on accessibility for this indicator?

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Develop process indicators

1. Activity code

2. What will you measure?

3. Where is the data available?

4. Are there any concerns about the reliability of this indicator?

5. Are there any concerns about the validity of this indicator?

6. Are there any limitations on accessibility for this indicator?

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Review your plan

1. COMPLETENESS: Is there a broad goal giving direction to the program (worksheet 3.1)?

   ❏ Yes ❏ No

2. COMPLETENESS: Does it have audiences including individuals, networks, organizations and/or governments (worksheet 3.1)

   ❏ Yes ❏ No

4. COMPLETENESS: Does it include SMART (specific, measurable, appropriate, realistic and time-limited) outcome and process objectives (worksheets 3.1 and 4.4)?

   ❏ Yes ❏ No

3. COMPLETENESS: Does it include a few major strategies identified to advance the outcome objectives and do these strategies reflect your overall guiding health promotion strategy (worksheet 4.1)?

   ❏ Yes ❏ No

4. COMPLETENESS: Does it include activities that fall within clearly defined strategies (worksheets 4.1 and 4.2)?

   ❏ Yes ❏ No

5. COMPLETENESS: Does it indicate what resources are required to implement each activity properly (worksheet 4.3)?

   ❏ Yes ❏ No

   COMPLETENESS: Does it include indicators for both outcome and process objectives (worksheets 5.1 and 5.2)?

   ❏ Yes ❏ No

7. COMPLETENESS: Are all indicators accessible, reliable, and valid?

   ❏ Yes ❏ No

8. LOGIC: Will the short-term objectives contribute to your medium and long-term outcome objectives (worksheet 3.1)?

   ❏ Yes ❏ No

9. LOGIC: Will the strategies contribute to meeting the goals and objectives (worksheets 3.1 and 4.1)?

   ❏ Yes ❏ No

10. LOGIC: Are the activities the best ones to advance each strategy (worksheets 4.1 and 4.2)?

    ❏ Yes ❏ No

Planning Promotional Programs and Seeking Funding Resources

11. LOGIC: Are the activities appropriate for the audiences (worksheets 3.1 and 4.2)?

    ❏ Yes ❏ No

12. LOGIC: Are there adequate resources in place to properly implement the activities?

    ❏ Yes ❏ No

13. ALIGNMENT WITH SITUATIONAL ASSESSMENT: Is your plan consistent with the key findings of the situational assessment? In particular, does your program plan take the major influences on your situation into account (worksheet 2.3)? (This check for alignment should also include a review of any new data that arose during the planning process.)

    ❏ Yes ❏ No

14. ALIGNMENT WITH SITUATIONAL ASSESSMENT: Will stakeholders be satisfied? (worksheet 1.2)

    ❏ Yes ❏ No

15. PRESENTATION: Is it user-friendly and easy to follow?

    ❏ Yes ❏ No

16. PRESENTATION: Is it easy to follow the arrows and/or flow of logic?

    ❏ Yes ❏ No

17. PRESENTATION: Is there enough white space?

    ❏ Yes ❏ No

18. PRESENTATION: Is it presented in an order that is useful for you and your stakeholders?

    ❏ Yes ❏ No

Planning Promotional Programs and Seeking Funding Resources

Review your plan using a population health approach lens

1. FOCUS ON HEALTH (Key Element 1): Did you carefully analyze health inequities and set priorities using good data and explicit criteria? (Worksheets 1.1 and 2.3)

   ❏ Yes   ❏ No

2. FOCUS ON HEALTH (Key Element 1): Did you assess environments, conditions and circumstances related to your situation? (Worksheet 2.3)

   ❏ Yes   ❏ No

3. DETERMINANTS OF HEALTH (Key Element 2) Did you consider how the determinants of health, and their interactions, link to your situation and possible solutions? (Worksheet 2.3)

   ❏ Yes   ❏ No

4. BASE DECISIONS ON EVIDENCE (Key Element 3): Did you use explicit criteria for what to include as acceptable evidence? (Worksheet 1.2 question 7)

   ❏ Yes   ❏ No

5. BASE DECISIONS ON EVIDENCE (Key Element 3): Did you use a range of the best evidence available (some of which may have been collected/created by you) to inform your planning decisions? (Worksheet 2.1)

   ❏ Yes   ❏ No

6. BASE DECISIONS ON EVIDENCE (Key Element 3): Did you identify and assess effective activities? (Worksheets 2.4 and 4.2)

   ❏ Yes   ❏ No

7. UPSTREAM INVESTMENTS (Key Element 4): Does your plan include short, medium and long-term activities? (Worksheets 4.1 and 4.2)

   ❏ Yes   ❏ No

8. UPSTREAM INVESTMENTS (Key Element 4): Does your plan include roles (and possibly resources) from multiple sectors, not simply health sector alone? (Worksheets 1.2 , 1.3, and 4.3).

   ❏ Yes   ❏ No

You have not worked on this bundle of questions

MULTIPLE INTERVENTIONS AND STRATEGIES (Key Element 5)

9. Produce comprehensive change through a series of incremental changes.

   ❏ Yes   ❏ No

10. Address the broad determinants of health.

    ❏ Yes   ❏ No

Planning Promotional Programs and Seeking Funding Resources

11. Reduce inequities.

    ❏ Yes   ❏ No

12. Be comprehensive across a range of health actions (health care to prevention to protection to health promotion).

    ❏ Yes   ❏ No

13. Integrate common risk factors (e.g. poor nutrition, low physical activity, etc.) across multiple health outcomes.

    ❏ Yes   ❏ No

14. Deal with multiple points in the intended population's lifespan.

❏ Yes   ❏ No

15. Work within multiple settings, such as the home, school, workplace and community.

❏ Yes   ❏ No

 You have not worked on this bundle of questions

MULTIPLE INTERVENTIONS AND STRATEGIES (Key Element 5)

16. 16. funding

    ❏ Yes   ❏ No

17. 17. technical assistance

    ❏ Yes   ❏ No

18. organization

    ❏ Yes   ❏ No

19. management

    ❏ Yes   ❏ No

20. education

    ❏ Yes   ❏ No

21. communications

    ❏ Yes   ❏ No

22. leadership and promotion

    ❏ Yes   ❏ No

Planning Promotional Programs and Seeking Funding Resources

23. political support

    ❏ Yes   ❏ No

24. COLLABORATION (Key Element 6): Have you produced a document outlining values, purpose, objectives, expectations and obligations to create shared leadership, accountability and rewards among partners? (Worksheets 1.2 and 1.4)

    ❏ Yes   ❏ No

25. COLLABORATION (Key Element 6): Has your planning process created commitment such that participants champion the program and have created political and public support for it? (Worksheets 1.2 and 1.4)

    ❏ Yes   ❏ No

26. PUBLIC INVOLVEMENT (Key element 7): Does your plan identify an appropriate level of public involvement, and ways and means to capture public interest and involvement? (Worksheet 1.2)

    ❏ Yes   ❏ No

27. DEMONSTRATE ACCOUNTABILITY (Key Element 8): Does your plan identify baseline measures and targets, with practical indicators for both? (Worksheets 5.1 and 5.2)

    ❏ Yes   ❏ No

28. DEMONSTRATE ACCOUNTABILITY (Key Element 8): Does your planning process include a results-based evaluation/accountability framework, including a commitment to disseminate findings? (Worksheets 5.1 and 5.2)

    ❏ Yes   ❏ No

Planning Promotional Programs and Seeking Funding Resources

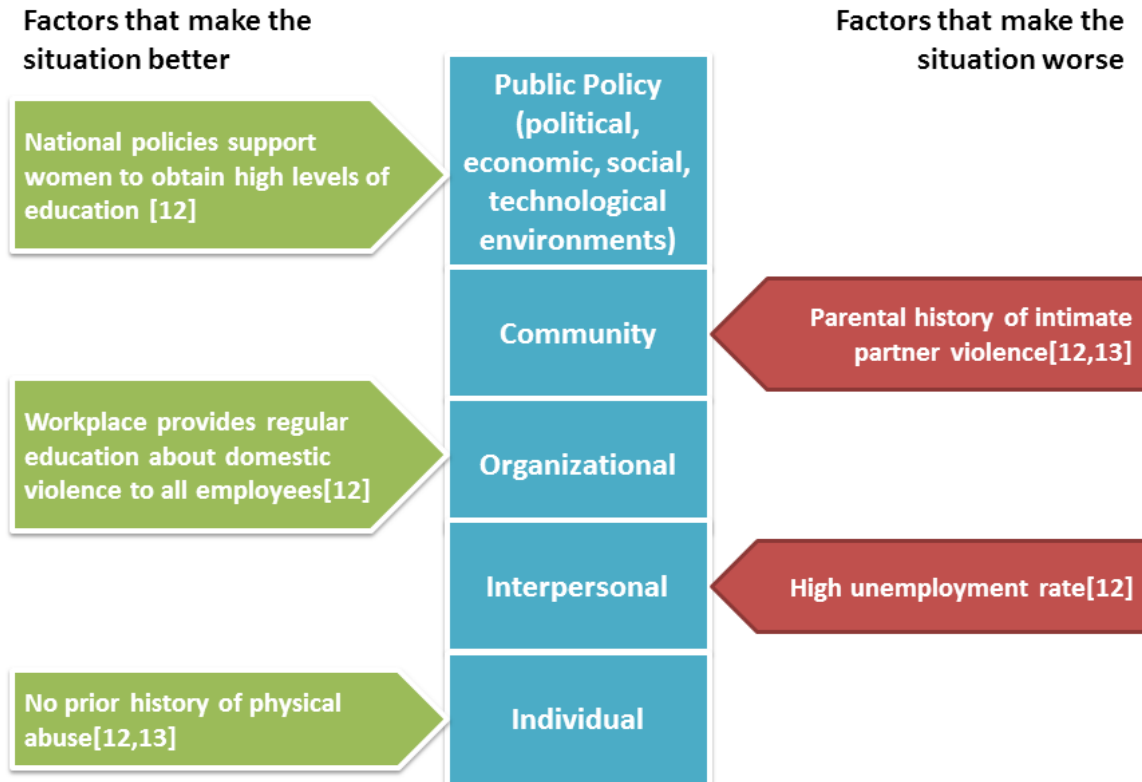## *Planning health promotion programs – Tables and Illustrations*

Examples of data sources

IF YOU WANT	TYPE OF DATA	DATA GATHERING METHOD	EXAMPLES OF SOURCES
Information about community needs	Community health status indicators	Literature search/review	Local Board of Health; Community Health Status Reports; Rapid Risk Factor Surveillance System - (RRFSS)[3] [5]; Canadian Community Health Survey –CCHS[4]; Public Health Agency of Canada (PHAC) infobase[5]
Information about what conditions – in the social or, organizational environments or at the broader public policy level – are causing or helping to alleviate the situation	Environmental scan	Focus group; key informant interview	Staff from community service organizations that are already working on the problem; project team; local public health epidemiologist; members of the intended audience; municipal planning department
Information about what evidence exists to support various courses of action	Best practice synthesis and guidelines; Summaries of systematic reviews	Search of databases populated with guidelines or pre-appraised systematic reviews	National Guidelines Clearinghouse; Turning Research into Practice (TRIP); Healthevidence[6-8]
Guidance about the nature and scope of the final program you develop	Review of stakeholder mandates, policies, guidelines, etc.	Internal document review	Strategic plans from your own, or related organizations; professional standards and guidelines; your own budget documents; documents summarizing the political agendas/priorities of your funder, etc.

Planning Promotional Programs and Seeking Funding Resources

Force-field analysis of intimate partner violence

Force-field analysis of intimate partner violence

Factors that make the situation better

Factors that make the situation worse

National policies support women to obtain high levels of education [12]

Public Policy (political, economic, social, technological environments)

Community

Parental history of intimate partner violence[12,13]

Workplace provides regular education about domestic violence to all employees[12]

Organizational

Interpersonal

High unemployment rate[12]

No prior history of physical abuse[12,13]

Individual

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SWOT analysis

FACTOR	EXAMPLE
Strength	Your organization has credibility with funders
Weakness	Internal accountability mechanisms make it hard to partner with other organizations
Opportunity	The provincial government has a new grant related to your program issue
Threat	Your local council has twice refused to fund such a program

SWOT analysis with strategies for each quadrant

	Opportunities	Threats
Strengths	**Invest** Clear matches of strengths and opportunities lead to competitive advantage	**Defend** Areas of threat matched by areas of strength indicate a need to mobilize resources
Weaknesses	**Decide** Areas of opportunity matched by areas of weakness require a judgement call	**Divest** Areas of threat matched by areas of weakness indicate need for damage control

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Goals vs. objectives

	GOAL	OUTCOME OBJECTIVE
Scope	General	Specific
Time	Not time-limited	Time-limited, relative to goals
Purpose	Set general direction (e.g. "to increase or decrease…")	Identify how much of what should happen, to whom and by when
Measurability	Need not be measurable	Measurable
Number	1-2 per program	Could be many, at each level of change
Link	Links back to strategic directions	Links back to goals

Goals vs. objectives

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Characteristics of objectives at each level

LEVEL OF OBJECTIVE	TYPE OF OUTCOME, RESULT, IMPACT OR EFFECT	CONTRIBUTING FACTORS	RELEVANT AUDIENCES
Individual	Maintain a personal behaviour change	An individual's: • knowledge • beliefs • attitudes • skills • self-efficacy	Segments most in need. For example: • men • children • lower-income groups • smokers • homeless people
Interpersonal	Social networks influence behaviour change	Frequency and content of conversations about a health issue within a social network	Opinions of networks such as: • Families • Groups of friends • Colleagues • Teammates
Organization	Develop policies	• Views about costs and benefits of policy change • Confidence and competence in developing effective health promoting policies	Decision-makers (primary) or employees, unions, customers (secondary) of organizations such as: • Schools • Worksites • Places of worship • Primary health care settings
Community	Change the social environment	Interactions between organizations and smaller social networks (i.e., families) Community organization and coordination of same	Opinion leaders of communities such as: Geographical communities Shared interest communities (e.g. artists' community) Collective identity (e.g., African American community)[9,15]
Society	Develop formal laws	• Actions of special interest groups • Media coverage • Public opinion	Elected officials; the public; special interest groups; media of a town, region, province, country

Characteristics of objectives at each level

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Sample objectives at each level

LEVEL OF OBJECTIVE	BY HOW MUCH	IN WHO (AUDIENCE)	WHAT YOU WANT TO CHANGE (OUTCOME)	BY WHEN
Individual	To increase by 10% the number of…	…adults between ages 50-80…	…who agree that depression and anxiety are highly treatable disorders that should be discussed with a doctor…	…within 2 years
Interpersonal	To increase by 20%, the percentage of…	…people who provide informal care (unpaid caregivers) to the elderly in Ottawa…	…who agree that mental health problems such as anxiety and depression are often closely linked to physical health complaints…	…in the next 12 months
Organizational	To increase by 10, the number of…	…physician offices in Niagara Region…	…that give all patients a screening tool for depression to take home once a year …	…within the next 18 months
Community	To increase by 5, the number of	…service providers in the Durham Region…	…that participate in collaborative care models for the management of depressive disorders…	…within the next 18 months
Public Policy	To increase by 3 the number of…	…Cabinet members…	…who feel that a national mental health strategy is a priority for Canada…	…in the next 18 months

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Sample outcome objectives at each level

LEVEL	SAMPLE OBJECTIVES
Individual	• Increase awareness of risk factors, personal susceptibility, solutions, or health problems • Increase knowledge (or recall, comprehension, analysis, synthesis) of ideas and/or practices • Increase awareness of local services, organizations, etc. • Change (increase positive, decrease negative, or maintain) attitudes Increase intention to make and sustain change • Increase information-seeking behaviour Increase perceived social support • Increase confidence about making behaviour changes (self-efficacy) Change behaviour
Interpersonal	• Increase favourable knowledge and attitudes held by members of social networks • Increase supportive activity (number of discussions of health issues) Increase number and kinds of health-related interactions within networks
Organizational	• Increase the number of gatekeepers, decision-makers and/or other influential people in organization considering policy changes or adopting specific programs • Increase the number of gatekeepers, decision-makers, other influential people and/or organizational members (or students, employees, etc.) who feel that the issue is important and change is necessary (building an agenda) • Increase the quantity and quality of information regarding the issue and the policy change required • Increase organizational confidence and competence in making health-related policy changes • Change/implement policy, and/or adopt/change program
Community	• Increase collaboration between organizations and groups of individuals Increase social support for positive changes • Change social norms and behaviours
Public Policy	• Increase the importance communities and society attach to an issue by increasing media coverage • Increase societal/public values and norms (attitudes and opinions) that support the policy change you are recommending • Increase the number of politicians who support the policy change you are recommending • Change/implement a policy

Sample outcome objectives at each level

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Health promotion strategies and associated activities

CLUSTERS OF RELATED STRATEGIES AND TERMS	EXAMPLES OF ASSOCIATED ACTIVITIES
Build healthy public policy; By-law development; Legislation; Regulation; Volunteer and organizational policies; Political action	Efforts to influence policies, operating procedures, by-laws, regulations and legislation can have a direct impact on health. For example: • Municipal alcohol policies help minimize alcohol-related injuries. • School board cafeteria policies help ensure young people eat more nutritious food and less junk food. • Seat belt and bicycle helmet laws help protect people from injury. • Laws that regulate the handling of hazardous materials combined with company policies and procedures make workplaces safer.
Create supportive environments; Healthy environments	The places where people live, work and play can impact behaviour. For example: • The design of a community may dictate whether walking is a pleasant experience for residents. • The location of a recreational facility can make it easier or more difficult for children to participate in activities. • A gym in a workplace can make it easier for employees to get daily activity.
Community mobilization; Community development; Foster public participation; Community organization; Coalition building; Strengthen community action	Communities can mobilize and work together to improve health through projects such as community gardens, healthy lifestyle community projects, neighbourhood anti-drug initiatives, Block Parent associations and community economic development projects. Some projects, such as healthy lifestyle and anti-drug programs, are designed to help people change behaviours. Others, such as community gardens and community economic development projects, attack the root causes of poor health, including poverty. Organizations that work to help communities mobilize usually act as a catalyst, by: • doing outreach in the community; • bringing key people (professionals and people in the community) together; and • helping the community develop the skills (capacity) it needs to organize and manage projects.
Develop personal skills; Counselling; Personal empowerment	Working with people – one-to-one or in groups – can help them develop knowledge and skills needed to improve their health, and provide the ongoing support they may need to have more control over their lives.
Strengthen community health services; Re-orient health services	The health sector can move toward health promotion, beyond clinical and curative services. It can also be designed in ways that are sensitive to the needs of different cultures and socioeconomic groups.

Planning Promotional Programs and Seeking Funding Resources

Provide information; Education	Fact sheets, brochures, and media can help people become more knowledgeable about health. For example, a copy of *Canada's Food Guide* combined with a cooking demonstration and recipes, can give people both the information and skills they need to eat better. Education may include seminars and workshops that professionals organize. It may also involve more general programs from a range of health-related and non-governmental organizations – such as literacy classes, life skills workshops and group counselling – that help people develop the skills to understand and act on health information.
Health communication; Social marketing; Risk communication; Communication for social change; Entertainment education; Online, interactive health communication; Tailored communication	Campaigns that use traditional marketing tools and techniques - such as advertising campaigns, slogans and logos – may influence attitudes and encourage social change (social marketing). Some campaigns strive to make certain practices socially unacceptable, like drug abuse, social smoking, and texting while driving. Others work to make practices *more* acceptable, such as recycling, using condoms and talking more openly to your sexual partners.
Self-care; Self-help; Mutual support	People directly affected by poverty or illness, or who care passionately about an issue, can develop a sense of their own power, control and influence. That can help them and others improve health.

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Sample process objectives at each level

LEVEL OF OBJECTIVE	HOW MUCH	WHAT YOU WANT TO DO OR PRODUCE	FOR WHOM (AUDIENCE)	BY WHEN
Individual	2,000	...educational pamphlets on the most effective treatment options for depression and anxiety sent ...	...to adults from 50- 80...	... next January
Interpersonal	6	...training sessions on how to distinguish between physical health complaints and anxiety/depression...	...to people who provide informal care (unpaid caregivers) to the elderly in Ottawa...	... next January
Organizational	20	...visits to help implement a depression screening system...	...to physician offices in Niagara Region...	... next October
Community	1	...social networking platform established to increase collaboration...	...between organizations and groups concerned with the management of depressive disorders in Durham Region...	... next September
Public Policy	1	...breakfast meeting about why a national mental health strategy should be a priority for Canada...	.....for Cabinet members...	...in the next two months

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Sample strategies, with related activities and outcomes

CLUSTERS OF RELATED STRATEGIES	SAMPLE ACTIVITIES—THINGS YOU DO OR PRODUCE FOR AN AUDIENCE	EXAMPLES OF OUTCOMES—OBSERVABLE CHANGES IN AUDIENCE/ENVIRONMENT
1. Build healthy public policy; By-law development; Legislations; Regulation; Volunteer and organizational policies; Political action	• Awareness campaign • Community letter-writing • Deputation to council, board, etc.	• New policies, procedures, by-laws, regulations, legislation
2. Create supportive environments; Healthy environments	Support groups Organizational flex time arrangement Provide free childcare to allow adults workout time Improved school parks	• Increase in perceived support dealing with an illness, situation, addiction, etc. • Changes in organizational procedures • Structural changes in the environment (green space, sidewalks, parks, trees, healthy food choices)
3. Community mobilization; Community development; Foster public participation; Community organization; Coalition building; Strengthen community action	• Create local action group • Train local leaders • Neighbourhood anti-drug forum • Block parents • Community economic development projects • Corporate contribution initiatives (donations of volunteers, money or other resources)	• Increase ability, capacity or confidence of individuals and groups to affect community change, policies, etc.
4. Develop personal skills; Counselling; Personal empowerment	• Parenting skill workshops that include role modeling discipline techniques • Cooking demonstrations • Personal fitness program development and training • Telephone smoking cessation counselling	• Increase confidence in ability to perform a behaviour • Increase in number of attempts to change a behaviour

Planning Promotional Programs and Seeking Funding Resources

5. Strengthen community health services; Re-orient health services	• Promote use of healthy lifestyle screening tools during annual physical exams • Change physician billing rules so lifestyle counselling is billable • Develop/fund multidisciplinary medical team (nurses, nurse-practitioners, dietitians, etc.) who have more time to work on prevention and health behaviour issue	• Increase patient accessibility to a broad spectrum of clinical and prevention services • Changes in patient lifestyle behaviours • Improve linkages between physical health care and social services in community (children's aid, etc.)
6. Provide information; Education	Materials that help people become more knowledgeable about health including fact sheets, brochures, newspaper and magazine articles, television programs, etc. • Events, demonstrations, workshops, classes, groups	• Increase understanding of health information • Increase motivation • Increase knowledge about where to get more information
7. Health communication; Social marketing; Risk communication; Communication for social change; Entertainment education; Online interactive health communication	• Text message campaign about smoking cessation services for teens • Online health assessment and tailored advice tool • Contest to develop your own web video about health conditions on your community	• Increase knowledge and awareness • Change attitudes • Modify behaviours • Increase number of discussions about a topic
8. Self-care; Self-help; Mutual support	• Create an online community for sharing concerns, questions, etc. about a specific topic • Train community peer support workers on an issue (cooking, prevention, etc.)	• Increase sense of one's own power to affect health or life circumstances • Increase in perceived social support in dealing with an illness or circumstance

Planning Promotional Programs and Seeking Funding Resources

Example outcome indicators and data availability

OUTCOME OBJECTIVE	INDICATORS	DATA AVAILABILITY	LIMITATIONS ON DATA AVAILABILITY
To increase by 10%, within 2 years, the number of adults between 50- 80 who agree that depression and anxiety are highly treatable disorders, which they should discuss with a doctor	• Percentage of people who agree that depression and anxiety are highly treatable disorders • Percentage of people who can identify two possible treatments for depression/anxiety • Number of doctor/ patient discussions about depression and anxiety disorders	• Canadian Community Health Survey, Mental Health and Well-Being component, Statistics Canada • Regional Psychiatry Program Annual Survey	• Collected every 5 years • Limited sample from our region, so harder to generalize • A free public access file is available for download, but this omits some data due to privacy reasons
To increase by 20%, in the next 12 months, the percentage of people providing informal care to the elderly in Ottawa who agree that mental health problems are often closely linked to physical health complaints	• Percentage of informal caregivers to the elderly who can list three physical health complaints that depression/anxiety may cause	• National Initiative for the Care of the Elderly	• Research study ends before the program is complete, so results could potentially be inaccurate (underestimated)
To increase by 10, within 18 months, the number of physician offices in Niagara Region that give all patients an annual take-home screening tool for depression	• Number of physician offices that give all patients a screening tool for depression	• No known source; will have to collect this ourselves	• Physicians are difficult to reach
To increase by 5, within 18 months, the number of community partners in Durham Region that participate in collaborative care models for the management of depressive disorders	• Number of organizations and groups engaged in a collaborative effort to manage depressive disorders	• No known source; will have to collect this ourselves	• Types of community organizations providing services may vary greatly between regions • There is no exhaustive list of all organizations that provide these services
To increase by 3, in the next 18 months, the number of Members of Parliament who feel that a national mental health strategy is a priority for Canada	• Number of MPs who can name one statistic that indicates a need for a national mental health strategy • Number of mentions in the national news media about lack of mental health services in Canada	• Canadian Institutes of Health Research (CIHR) 15-minute survey of knowledge and attitudes toward health research funding	• A process is underway where survey administrators are prioritizing survey questions; this one may not make the survey • The survey happens three months after our program finishes, so. the effects may have faded • The service has a fee

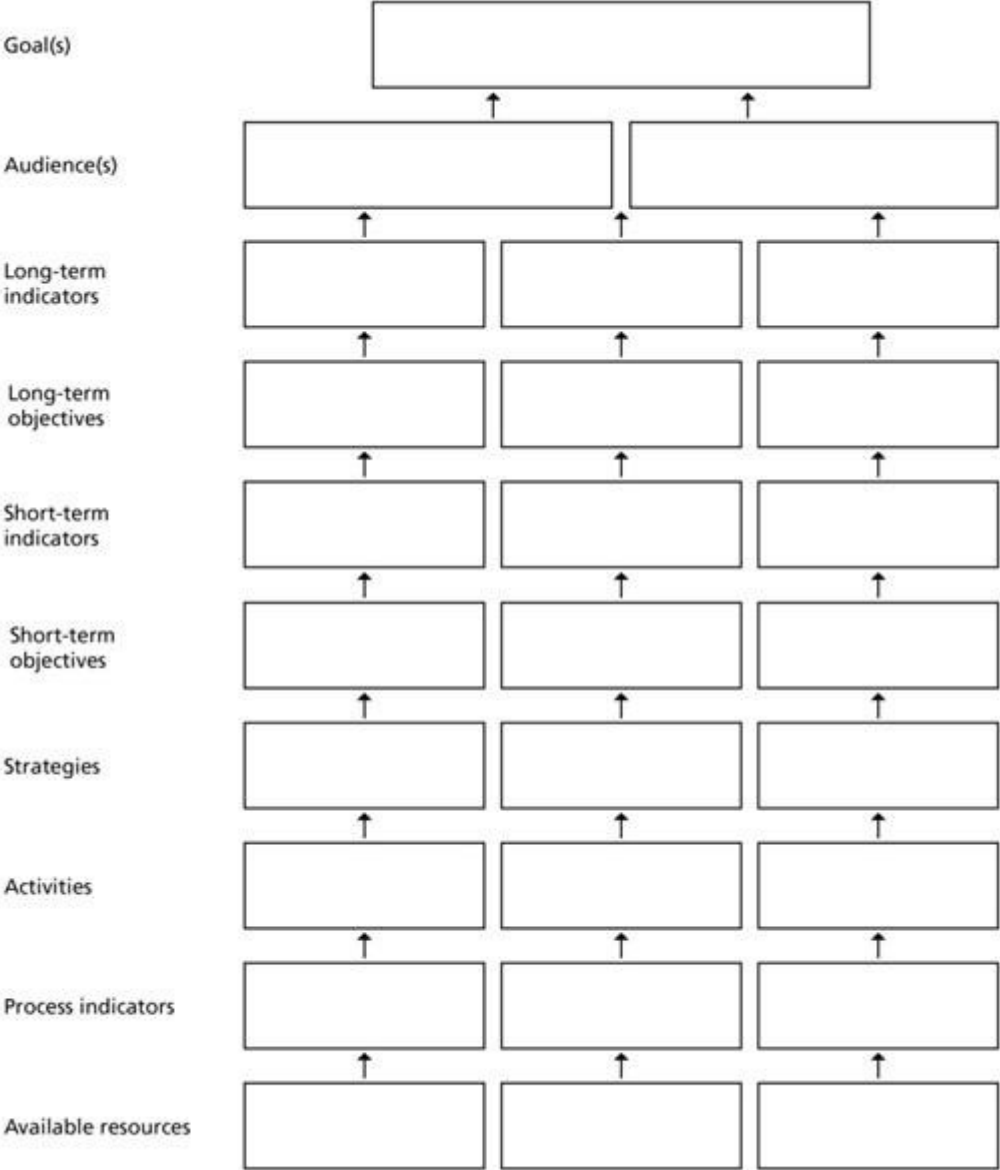# Planning Promotional Programs and Seeking Funding Resources

Planning Promotional Programs and Seeking Funding Resources

Example quantitative and qualitative process indicators

PROCESS OBJECTIVE	EXAMPLES OF QUANTITATIVE INDICATORS	EXAMPLES OF QUALITATIVE INDICATORS
2,000 educational pamphlets on the most effective treatment options for depression and anxiety, sent to adults aged 50-80 by next January	• Number of pamphlets sent • Percentage (when asked) who remember receiving the pamphlet • Percentage (when asked) who remember reading the pamphlet	• Recipient comments about what they did and didn't like about the pamphlet
6 training sessions, conducted by next January on how to distinguish between physical health complaints and anxiety/depression to people who provide informal care (unpaid caregivers) to the elderly in Ottawa	• Number of attendees at each session	• Facilitator list of topics discussed during each session • Participant ideas about how to improve the sessions
20 visits to physician offices in Niagara Region, by next October, to help implement a depression screening system	• Number of visits completed • Number of offices that declined visit	• Visitor notes about what barriers physicians or their staff mentioned in relation to implementing the screening system
1 social networking platform established by next September, to increase collaboration between organizations and groups that offer services to manage depressive disorders	• Number of members • Number of unique visits to webpage(s) • Time spent on webpage(s)	• List of organizations and groups that joined the social networking platform • List of conversation topics on the webpage(s)
1 breakfast meeting for Cabinet Members in the next two months to present why a national mental health strategy should be a priority	• Cost of the meeting, including planning time, clean-up and follow-up • Number of attendees and invitations declined • Percentage of attendees who stayed for the entire session.	• List of which Cabinet Members attended • Session transcripts showing questions/comments from Cabinet Members

Planning Promotional Programs and Seeking Funding Resources

Generic program logic model

Goal(s)			
Audience(s)			
Long-term indicators			
Long-term objectives			
Short-term indicators			
Short-term objectives			
Strategies			
Activities			
Process indicators			
Available resources			

Generic program logic model

Planning Promotional Programs and Seeking Funding Resources

Generic program logic model B

Goal(s)	
Audience(s)	
Long-term outcome objectives	
Medium-term outcome objectives	
Short-term outcome objectives	
Strategies	
Activities	
Process objectives	
Resources allocated	
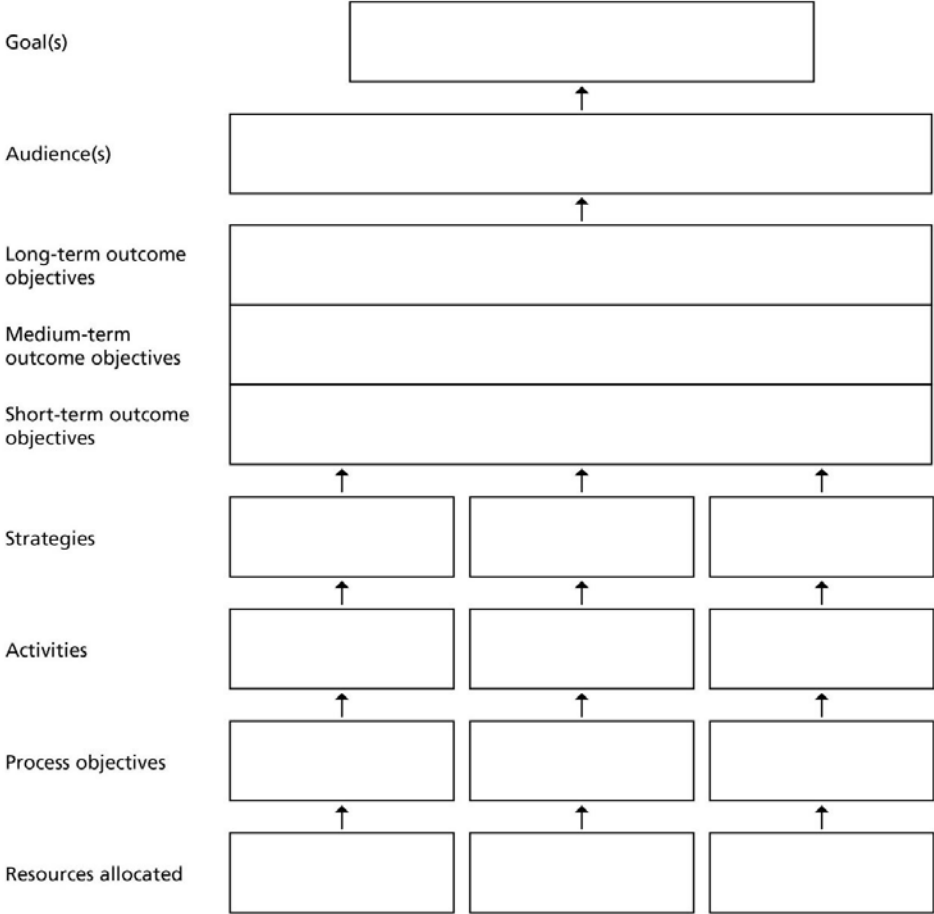
Planning Promotional Programs and Seeking Funding Resources

Proposal for Funding Grant

Step One: Project Plan Worksheet

Background **Goals** 	

OUR PROJECT	
1. Populations of interest	
2. Geographic area of interest	
3. Specific, measurable outcome objectives that describe concrete changes in populations of interest	
4. Broad strategies (e.g., policy development, education, skill building)	

Proposal for Funding Grant

Step One: Project Plan Worksheet

Planning Promotional Programs and Seeking Funding Resources

5. Specific activities (e.g., a mass media campaign, a workshop, an event)	
6. Resources required Hint: consider space, equipment, and workload implications in addition to dollars, etc.	
7. Timelines	
8. Evaluation indicators	
9. Other program notes	

Note to desktopper: The idea is to lie these two sheets (steps 1 and 2 worksheets) next to each other to complete the 'fit' score. The participant will complete one for their own project (worksheet 1) and one for EACH funder (worksheet 2) – so thay have to be separate, but compatible. To allow enough room to fill in the information each worksheet will have to be more than one page long. That's fine as long as they can be matched together in hard copy for comparison. I left approximately the amount of room I think is needed to fill in the information on worksheet one. Please make worksheet two match, in terms of space, so that they can be laid side by side (i.e. numbers 1-9 matching).

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Step Two: Prospect Assessment Worksheet

Funder Name	
Funder Address	
Contact person	
Previous history with your organization	

FUNDER INTERESTS		
	Fit score 1-5 5 = excellent 4 = good 3 = average 2 = below avg. 1 = poor	Notes
1. Populations of interest		
2. Geographic focus area		
3. Outcomes/topics of interest		
4. Strategies of interest		
5. Activities of interest		

Planning Promotional Programs and Seeking Funding Resources

6. Resources			
a. Range of grants available			
b. Restrictions on use of money (e.g. staffing, types of organizations which can qualify)			
7. Timelines			
a. Period of funding			
b. Proposal requirements			
8. Project evaluation expectations			
9. Other administrative or project requirements (e.g., reporting, payroll capacity, financial tracking systems)			

Planning Promotional Programs and Seeking Funding Resources

Step Three: Stakeholders Wheel

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Step Three: Management of People Connected to the Proposal ProcessWorksheet

Person or organization	Contact (if different from column to the left)	Responsibility/ Role in proposal process	Contact is aware of and satisfied with role?	Notes:
			❏	
			❏	
			❏	
			❏	
			❏	
			❏	
			❏	
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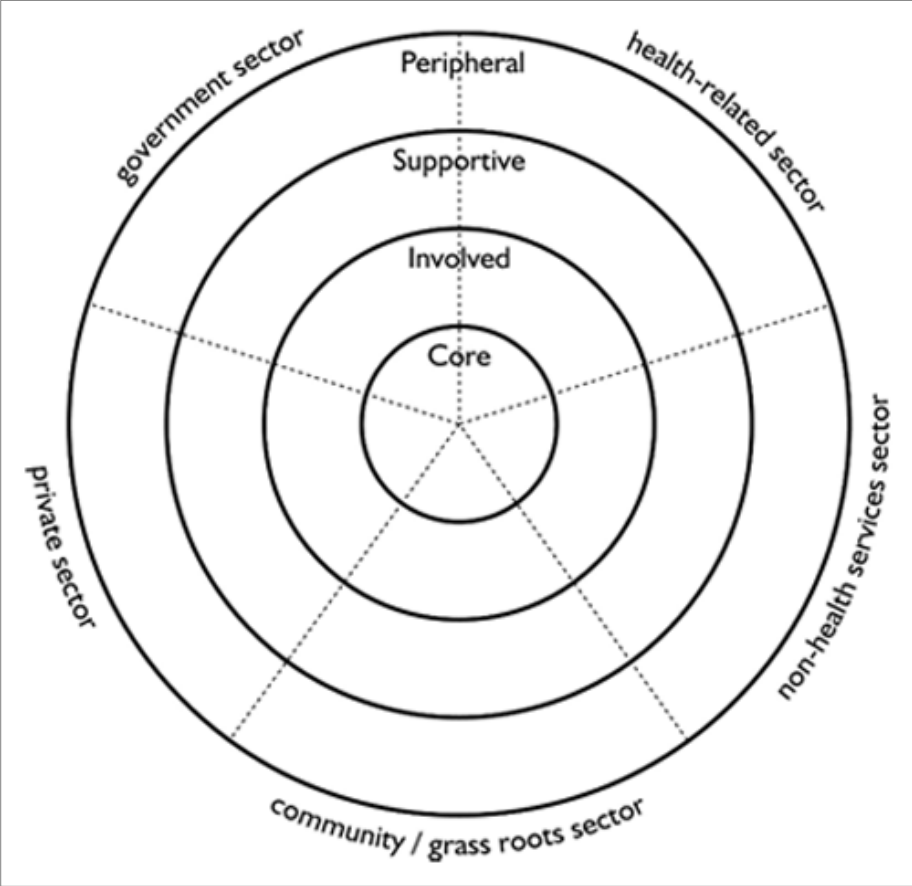
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Step Three: Proposal Work Plan Worksheet

Proposal section	Person responsible	Due date	Data gaps	Plans for how to fill data gaps
Introduction				
Project description				
Goals & objectives				
Methodology				
Staffing & Administration				
Evaluation				
Sustainability				
Other (e.g. logic model)				
Budget				
Organization Information				
Appendices				
Executive Summary				
Title Page				

Planning Promotional Programs and Seeking Funding Resources

Step Four: Proposal Content Checklist

Cover Letter Is it….	✓	Notes
…on organization letterhead?		
…a brief version of what appears in the executive summary?		
…identifying significant benefit to be gained from the project?		
…showing the fit with the funder's goals and interests?		
…showing your excitement for the project?		
… signed by the President or Chairperson of the organizations' Board of Directors?		

Title Page Does it include…	✓	Notes
…a project title that provides a brief indication of the focus of your proposal?		
…the name of applicant?		
…the name of agency submitted to?		
…a typed name?		
…contact information?		
…the title of authorized personnel approving submission?		
…the signature of authorized personnel approving submission?		
…the date of approval?		
…the date of submission?		

Planning Promotional Programs and Seeking Funding Resources

Executive Summary Does it include…	✔	Notes
…a brief statement of the problem or need?		
…a short description of the project, including what will take place and what outcomes are expected?		
…an explanation of the amount of grant money required for the project?		
…sustainability expectations - your plans for continuing the project in the future?		
… a brief statement of the name, history, purpose and activities of your agency, emphasizing its capacity to carry out this project?		

Introduction Does it include…	✔	Notes
…a short summary of the problem in terms of the needs of humans and other life?		
…a brief summary of evidence and examples showing the significance of the problem, and demonstrating a precise understanding?		
…an explanation about why this problem should be of special interest to the funder that includes links between your project idea and funder's priorities?		
…a brief overview of what you plan to do?		
…highlights about the unique or innovative aspects to your proposal?		
…highlights of relevant recent experience?		
…highlights about what makes you unique?		
…links between the project and your organizational goals?		

Planning Promotional Programs and Seeking Funding Resources

Project Description	✓	Notes
Goal and outcome objectives Does it include…		
…separate goals and objectives?		
…objectives that are specific (i.e. that identify an audience of interest, and the specific change that you plan on effecting in that audience)?		
…objectives that are measurable?		
…objectives that are attainable?		
…objectives that are realistic?		
…objectives that are time-limited?		
…a brief explanation of why these objectives were selected?		
…a brief explanation of why these objectives are of special interest to the funder?		
…indicators that will clearly show whether the objectives were achieved?		
…a summary of evidence showing that your project will result in achieving the objectives (with details in the Appendix)?		
…a realistic assessment of the available resources for achieving your objectives?		
…details about when the objectives will be met?		

Planning Promotional Programs and Seeking Funding Resources

Methodology Does it include…	✓	Notes
…a detailed description of what activities will occur from the time the project begins until it is complete?		
…links between methods and outcome objectives?		
…an explanation of the interrelationships among project activities?		
…a description of why particular methods were chosen?		
…evidence and examples of past experience that justify your choices of methods?		
…notes about who will carry out each project task?		
…chronological presentation of tasks, with clear deadlines attached to critical junctures?		

Staffing and Administration Does it include…	✓	Notes
…names of people who will undertake the work?		
…qualifications of people who will undertake the work?		
…details of the specific assignments each person will undertake?		
…details about the time each person will devote to the project?		

Planning Promotional Programs and Seeking Funding Resources

Evaluation Does it include…	✓	Notes
…an explanation about who the evaluation is intended to serve, and how the results will assist them?		
…links between evaluation and objectives ?		
…a description of the type of evaluation that will be used?		
…explanation about whether data collection strategies will be qualitative, quantitative, or a combination?		
…a description of evaluation tool use or development?		
…justification (e.g., literature, experience, needs of the people the evaluation is intended to influence or assist) for evaluation types, methods and tools?		

Sustainability Does it include…	✓	Notes
…evidence that the project fits into one of the following categories: D The project meets a finite need that will be met within the clear start and end dates of the grant. D The project builds capacity, such that your organization, or others will be able to continue the work, without outside funding. D The project will increase the likelihood that other funders will provide support.		

Budget Does it include…	✓	*Notes*
Program Income		
Direct costs		
…personnel costs including salaries, wages for temporary staff, fringe benefits?		
…travel?		
…consultants and contracts (fees for service)?		
…services, supplies, and materials such as advertising, promotion, postage, printing, program materials, supplies, bank/payroll charges, professional fees (audit and legal)?		

Planning Promotional Programs and Seeking Funding Resources

…equipment purchase and rental?		
Indirect Costs	✓	**Notes**
…overhead and administration?		
…facilities and utilities, including telecommunications?		
…other costs such as repair and maintenance charges for rental equipment, meeting costs, subscription dues, temporary help, insurance, bonding costs?		

Organization Information Does it include…	✓	*Notes*
…mission?		
…relationship between mission and this project?		
…audience served – characteristics and size?		
…organization's structure?		
…activities, programs, and special expertise?		
…board information – size, method of recruitment, level of participation, members (appendix)?		
…role of volunteers?		
…staff - numbers of full and part-time staff, and their levels of expertise?		
…specific relevant experience?		
…when your organization came into existence ?		

Appendices Do they include…	✓	*Notes*
…strong letters of support and commitment?		
…assurances of cooperation provided in instances of inter-agency support?		
…resumes for all key project personnel and consultants?		

Planning Promotional Programs and Seeking Funding Resources

Step Five: Producing and Packaging Checklist

Technical writing skills Have you….	✓	Notes
…used ideas consistently, making no contradictions within proposal?		
…used words consistently, always defining terms in the same way?		
…applied formatting consistently (e.g., italics, bold, quotation marks, capital letters, headings, references, footnotes, etc.)?		
…used sentences that are clear and concise?		
…built a logical flow where each point builds on the one that came previously and concepts are not assumed to be 'common sense'?		
…minimized loosely relevant information , staying on topic and ensuring that all supporting material is linked to your proposal?		
…used complete sentences, where each subject has a verb?		
…properly used of pronouns where referent is clear?		
…correctly used grammar, as identified by a skilled proof reader?		
Visual presentation **Do you have…**	✓	
…a font style and size that make your proposal easy to read?		
…headings and subheadings that reveal the main ideas and the organization of your proposal to the reader?		
…page numbers?		
…list format as many places as are appropriate?		