
Checklists for Education Outreach Campaign Design

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About DeHavilland Associates

DeHavilland Associates is a consulting and communications firm that helps its corporate, nonprofit, and association clients understand and connect with the K-12 community. The company designs, manages, and evaluates outreach campaigns and partnership programs for its clients and creates original initiatives to help educators and education stakeholders establish and strengthen dialogue for the benefit of public education.

For more information, visit www.DeHavillandAssociates.com.

About the Business/Education Partnership Forum

Created and managed by DeHavilland Associates, the Business/Education Partnership Forum is an online clearinghouse for anyone interested in learning how to build effective business/education partnerships. This clearinghouse offers news and announcements, links to resources, a directory of organizations involved in business/education partnerships, and a monthly newsletter.

For more information, visit www.biz4ed.org.

About the Effective Education Partnerships Conference

The Effective Education Partnerships Conference (EEPC) is an annual two-day meeting for the practitioners of business/education partnerships, including chambers, business coalitions, individual businesses, school and district leaders, and others interested in hearing case studies and effective practices from others in the field. EEPC will be held July 10-11, 2008 in Fairfax, VA.

For more information, visit www.eepc2008.com.

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A series of Checklists for Education Outreach Campaign Design from DeHavilland Associates

Checklist #1: Maximizing Your Campaign Assets

Campaign design starts with a complete inventory of available assets. Start with the list of predefined assets that were assigned to your campaign, including budget and manpower, then use some creative thinking and research to identify additional resources you may not have considered.

	Checklist Item	Examples/Critical Questions
<input type="checkbox"/>	I have considered whether my firm's products or services are relevant to my campaign and whether I can incorporate them in some way.	<i>Since you're likely able to get them at cost or below, providing your firm's products or services as part of your contribution to education can help you leverage your investment. If not appropriate for the classroom, you may be able to use the products as prizes, or trade them for something more appropriate to the learning experience.</i>
<input type="checkbox"/>	I have determined how my organization's strengths can be leveraged in my campaign.	<i>"Strengths" may include market knowledge, distribution network, core competencies, and the like.</i>
<input type="checkbox"/>	I have analyzed our workforce to determine whether employees can contribute to my program.	<i>Research shows that volunteering can boost employee morale; it can also provide an opportunity for skill development. Consider factors such as location, expertise, and skill set to determine whether employees can offer knowledge or volunteer time to your program.</i>
<input type="checkbox"/>	I have analyzed my organization's relationships in the market to uncover partnership opportunities.	<i>Relationships may include suppliers, strategic partners, trade associations, regulators and legislators, or celebrity endorsers.</i>
<input type="checkbox"/>	I have considered how other departments' goals may align with my campaign goals, and whether those departments can contribute resources to support our mutual objectives.	<i>Other departments, such as government relations or human resources, may be interested in the ways in which your efforts can help them achieve their objectives. If you build your campaign in a way that can support their objectives, they may be able to provide additional campaign resources in return.</i>
<input type="checkbox"/>	I have considered how my organization's marketing and communications channels can be used to communicate with each relevant stakeholder group.	<i>Channels include all marketing and customer communications in which your organization is engaged, such as advertising, customer statements, and website. This is not a substitute for your outreach planning (checklist five); however, highlighting your program through existing channels can enhance your outreach efforts and provide increased exposure with key stakeholders.</i>

Checklist #2: Targeting Your Efforts

There are more than 120,000 schools in the US (public and private combined) serving nearly 50 million children across 13 grade levels. Given limited resources, it makes sense to narrow your focus and serve a small segment of that total population. Consider the following as you hone in on the most appropriate market segment for your campaign.

	Checklist Item	Examples/Critical Questions
<input type="checkbox"/>	I have considered geography as a factor.	<i>If employees are being asked to volunteer, your program will need to be restricted to communities in which the company does business. You may also want to limit your focus to areas in which your products are sold to reinforce the link between sales and community engagement. You might also consider a geographic limitation to address a specific issue (ex: cleaning up a park) or simply to pilot a program in order to test it prior to a national rollout.</i>
<input type="checkbox"/>	I have considered how the need for my resources may contribute to my program's focus.	<i>If your program features a donation of products or services, you can narrow your scope based on where those resources "fit" within a school. Donated food products may be given to foodservice programs or family/consumer science classes, for example. This should not be an automatic limitation, however: employees of a food company could volunteer in any area, or the company could contribute a certain percentage of sales to any number of classroom initiatives.</i>
<input type="checkbox"/>	I have determined whether our industry focus, branding, or positioning should play a part in our program's development.	<i>Many businesses build programs that align with what they do or sell. Banks, for example, often provide financial education to schools; cable networks, through nonprofit Cable in the Classroom, offer instruction in media literacy as one of their initiatives, and individual cable networks tend to focus on initiatives that align with their programming (such as VH1's Save the Music Foundation).</i>
<input type="checkbox"/>	I have thought through our organizational objectives to determine whether our outreach program can support those objectives in some way.	<i>The primary goals set out at the beginning of this process will certainly play a part in narrowing the focus of your efforts. If you've decided to focus on workforce development, for example, you'll likely focus on middle schools and high schools, possibly limit that focus further to students interested in a certain type of profession.</i>
<input type="checkbox"/>	I have considered whether our company or industry is particularly well-aligned with the interest or capabilities of any particular age group.	<i>Some industries or companies may naturally align with a certain age group. Disney is likely to serve younger children, for example, while Monster.com would focus on older children.</i>

Checklist #3: Designing Your Program

Once you've identified assets and narrowed the potential scope of your program, it's time to determine how you can make the greatest positive impact in the lives of students.

	Checklist Item	Examples/Critical Questions
<input type="checkbox"/>	I have identified the organizations and publications that serve my chosen market and invested time to become more familiar with how the market operates.	<i>Subscribe to publications that offer general information on the education market, and then immerse yourself in your chosen area by reading appropriate magazines and books, joining relevant associations, and attending conferences and meetings in your field.</i>
<input type="checkbox"/>	I have build an advisory group to support me in my planning and implementation efforts.	<i>One of the best steps you can take is to build an advisory group made up of experts and influencers along with stakeholder representatives, primary sponsors, and user representatives (teachers, parents, students). They can provide insight into the market along with advice, introductions, and credibility</i>
<input type="checkbox"/>	I have a firm grasp on market conditions.	<i>There are several things you need to determine prior to designing your program, such as: to what types of technology do teachers and students have access? What types of instructional tools (textbooks, videos, manipulatives, etc.) are being used in the classroom? What curriculum standards do they need to meet?</i>
<input type="checkbox"/>	I have built a research base that clearly articulates the challenge(s) I plan to address as well as evidence-based solutions to meet that need.	<i>It's important to look at what others have done in your chosen area, both to help you accurately identify the issues you'd like to address and also to help you build a program that leverages the experiences of others – in other words, to do what works and avoid mistakes that others have already made.</i>
<input type="checkbox"/>	I have worked with my advisory board to determine realistic and measurable outcomes we can help teachers and students achieve.	<i>Outcomes are critical; you need a clear sense of what you want students and teachers do, and to what end, before you build your program.</i>
<input type="checkbox"/>	I have built my program model by working with my advisory board and experts to determine how our resources and organizational goals align with market needs, desired outcomes, and proven approaches.	<i>Once you know your resources, education audiences, and desired outcomes (for students and teachers, as well as other stakeholders), you can work with your advisory board to draft and refine your outreach campaign. Expect a few rounds as you solicit feedback from likely or committed participants.</i>

Checklist #4: Building Your Evaluation Plan

You've determined your desired outcomes for all groups, including your education audiences (students, teachers, parents) and relevant stakeholders (such as employees and customers). Now it's time to build an evaluation plan to make sure you're accomplishing what you've set out to accomplish.

	Checklist Item	Examples/Critical Questions
<input type="checkbox"/>	I have developed a causal model that links activities to outcomes.	<i>A causal model (or logic model, or program theory) is simply a description of what you plan to do, and how that action will lead to your proposed results. A simple example: our employees will mentor high school students, which will increase those students' engagement and understanding of targeted materials, which will lead to improved attendance, grades, and test scores.</i>
<input type="checkbox"/>	I have a list of qualitative and quantitative outcomes desired for each audience along with appropriate measures for each outcome.	<i>Note that there may be more than one measure for each outcome: there are several (complementary) ways of measuring student engagement, for example. Remember to accommodate the measurement interests of your campaign partners.</i>
<input type="checkbox"/>	I have a control group that will allow me to see whether my program is having a positive impact.	<i>A control group is a group similar to the population being served by your program, but that does not take part in your program. By contrasting the measured outcomes from this group against your test group, you'll be able to see whether your program had an impact on your target population.</i>
<input type="checkbox"/>	I have gathered initial data on each of these measurements in order to provide a basis for measuring progress.	<i>In order to measure progress with a "before and after" type of analysis, you'll need data from your test and control groups prior to launching your program. Make sure what you measure and how you measure it remains consistent.</i>
<input type="checkbox"/>	I have established a plan for gathering data during program implementation.	<i>In addition to gathering data prior to program launch and after it wraps up, you should also look for ways to analyze it in midstream. You can capture additional quantitative data at various points to better track progress; you can also measure qualitative progress (interest, engagement, ease of implementation) through interviews and independent observations.</i>
<input type="checkbox"/>	I have set aside time to analyze incoming data and am prepared to modify my program accordingly.	<i>If you're making a long-term investment in education, it's essential that you learn from your first year's efforts in order to improve your program and better serve your audiences. You may find that your program didn't work as expected or that it didn't work very well at all; the important thing is to learn from this and tweak accordingly.</i>

Checklist # 5: Building Your Communications Plan

You've developed your campaign plan, and now you're ready to roll it out. Consider the following checklist as you determine your marketing methods and objectives.

	Checklist Item	Examples/Critical Questions
<input type="checkbox"/>	I have determined my marketing objectives: the number and type of participants I want to reach within each audience and stakeholder group, and the actions I would like to elicit from each group.	<i>Remember that you're not only promoting your program to potential participants, but to all your stakeholders: customers, employees, the media, stockholders, legislators, and others you deem appropriate. Be sure to build an outreach campaign and messaging plan that reflects all of these stakeholder audiences.</i>
<input type="checkbox"/>	I have identified all of the channels appropriate to reaching my target audiences.	<i>Different channels can be used to reach different stakeholder groups, and your education marketing plan will be based primarily on the type of campaign you've built. A national curriculum-based initiative, for example, can take advantage of mass marketing channels such as direct mail and advertising, while a local campaign may rely on personal outreach. In addition, remember to talk with all campaign partners to see what channels they may be able to offer (such as regular member communications for education associations) as part of their partnership contribution.</i>
<input type="checkbox"/>	I have determined my marketing mix.	<i>Your marketing mix will be determined by the objectives you have for audience, available resources, and the appropriateness of each channel to your objectives.</i>
<input type="checkbox"/>	I have given all partners and advisors credit.	<i>Remember to highlight the contributions of all project partners!</i>
<input type="checkbox"/>	I have a plan for measuring results based on program participation, impressions, or other criteria.	<i>Whenever possible, build in measurement tools to determine the effectiveness of each marketing effort. If you're using direct mail, for example, plan on a coding system so you can track the results of the lists you use, and possibly even to test variations in design and copy. Responses from other efforts, such as advertising and PR, can be tracked with different codes, or even by simply asking "how did you hear about us" online and on the phone.</i>
<input type="checkbox"/>	I have a plan to promote the success of our program.	<i>I make sure you've allocated a portion of your communications budget to trumpeting your success once your program has wrapped up and the results are in: this type of recognition and visibility will reward project partners, build goodwill among stakeholder audiences, and lay the groundwork for a successful launch in your next cycle!</i>



DeHavilland Associates
9700 Research Drive, Suite 123
Charlotte, NC 28262
704.940.3201

<http://www.DeHavillandAssociates.com>