RETAIN Strategic Communications Plan Guide

The RETAIN Strategic Communications Plan Guide (Guide) will help you systematically plan communications regarding RETAIN outreach to employers, participants, and health care providers. The Guide may be used to inform your strategic communications plan and tailor it as needed to accommodate variations in state implementation and organizational strategy. Consider using a RETAIN letterhead or state-specific RETAIN logo/branding when making a formal strategic plan.

The Guide includes a sample organizational structure, tips for the communications plan development process, recommendations for developing an effective messaging campaign, and an optional communications plan template, found in the appendix. This template was constructed to replicate the format described in this Guide. It can serve as a resource and as an example you can customize to meet your state's RETAIN marketing and outreach needs and goals.

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Draft Overview or Executive Summary



An overview or executive summary sets the tone for the communications plan and provides context regarding the purpose of a document. This section also provides a snapshot of the communications plan content, purpose, and goal(s) for current or future internal stakeholders in a quick, easy-to-understand format. In constructing this section:

- Use clear language to summarize the context of participating in the RETAIN initiative in your state.
- Consider using statistics, actual numbers, or number words, as in the example below, to provide a sense of scale.
- End the overview with your state's key RETAIN Phase 2 goals, how they are related to your state's strategic communications plan, and how the plan will contribute to achieving Phase 2 goals.
- Consider using bullet points with clear, direct language to make the goals stand out, as in the following example.
- Explain processes visually, such as with charts or other graphics, to increase clarity and demonstrate the strategy you have set out in the communications plan.

Example:

Unfortunately, [number or percentage] hard-working people in [state] must leave the labor force every year, at least temporarily, due to injury or illness. Without steady earnings, these workers and their families often end up bearing many of the unexpected costs of their injury or illness themselves. [State RETAIN program name] is helping to reduce costs to workers by adopting strategies to help people stay at or return to work.

The Retaining Employment and Talent after Injury/Illness Network (RETAIN) Initiative focuses on building capacity to positively address these impacts on workers and their families or caregivers. [State RETAIN program] offers stay-at-work/return-to-work (SAW/RTW) strategies, interventions, and tools to help workers remain in the workforce following an illness or injury. Our goals are:

1. To increase employment retention and labor force participation of individuals who acquire and/or are at risk of developing work disabilities; and
2. To reduce long-term work disability among project participants, including the need for disability benefits (e.g., SSDI, SSI).

[State RETAIN program] is working with the U.S. Department of Labor's (DOL) Office of Disability Employment Policy (ODEP) in partnership with the Employment and Training Administration and Social Security Administration to help our talented workers stay in or return to work. We are also working with [insert Employer and/or Provider partner list here; focus on key or prominent partners].

In order to make the most impact, [state name] has developed an effective strategic communications plan that is organized, informed, and targeted to both the audience and our outreach needs.

Determine Goals



This section of a strategic communications plan states the purpose of the plan directly—the goal(s) that strategic communication aims to achieve. Determining specific communication goals is the first step in developing an effective marketing plan. Consider the following when drafting this section:

- State the plan goals clearly and concisely, ensuring that they are related to overall Phase 2 goals.
- Discuss the overall strategic communication approach, if not done in the overview/ executive summary.
- Update the plan regularly to ensure that the strategic goals are still relevant and the plan is meeting your state's needs.
- Consider using bullet points, as in the example below, so the goals are clearly differentiated from other text.

***Example*:**

This strategic communications plan will ensure that [state name] will:

1. Strengthen collaboration and outreach with employers over the next year by creating an internal "employer network" to list actively engaged employers.
2. Build on our Phase 1 successes with physician outreach and increase engagement by expanding overall physician outreach, especially in [targeted geographic area].
3. Using both successes and lessons learned, expand RETAIN to five new counties by targeting participants, physicians, and employers.

Research and Gather Information



The second step in an effective strategic communications plan is gathering information and conducting any necessary research. This plan for research and information should be documented in your overall communications plan. Consider the following when drafting this section:

- Demonstrate methods for gathering information that will help succinctly define objectives, target audience(s), key messages, and appropriate outreach methods.
- Display relevant research and information to be gathered both internally and externally to inform the plan.
  - Examples of internal information gathering include an internal audit of Phase 1 materials and tools to see if they meet Phase 2 needs and brainstorming with staff on lessons learned in Phase 1.
  - Examples of external research include conducting surveys, and focus groups, and performing a SWOT analysis.
- Organize and store this information in a designated location for review and with an agreed-upon naming convention.
- Consider the scope of your current communications strategy and prior communications for lessons learned and areas for growth.
- Consider the time and staff resources required to gather all the information desired and create a timeline with internal deadlines and an overall deadline to manage the scope of research.

Example:

The first step in our strategic communications plan is to gather information, conduct research, and evaluate our performance. During Phase 1, various communications materials were developed and utilized. To understand their impact in Phase 1 and determine their relevance for Phase 2, [organization name] will conduct an internal audit of all tools and communication materials. A team will be assigned to gather, organize, and analyze these materials. In addition to the internal audit, a team will be assigned to develop and execute a survey of our outreach touch points (e.g., health care professionals, employers, community partners, participants) and stakeholders. The purpose of the survey is to gauge how effective outreach and communications were in Phase 1, determine areas of improvement, and gather suggestions for future outreach.

Once the internal audit and external outreach survey have been completed, the two teams will come together to discuss the results, determine any obvious gaps in our communications efforts, and perform a SWOT analysis to inform our Phase 2 outreach. The following table will serve as an example for the analysis.

Strengths	Weaknesses
• Phase 1 outreach efforts to physicians were vital for referrals. • Flyers were effective at reaching underserved communities.	• Costs associated with printing materials and news ads were a large portion of the budget, constraining other outreach methods. • Employers did not respond well to Phase 1 outreach efforts; they did not return cold calls or emails.
Opportunities	**Threats**
• Expand area for services to five more counties. • Increase the use of flyers in underserved communities. • Increase outreach and awareness efforts with physicians and employers.	• The price of news ads has increased by 2% and paper by $1.89 per ream. • Fewer people are seeing physicians, the main source of referrals, because of the pandemic. • Employer partners have competing priorities.

Define Objectives



This section is where you determine which actions you want to accomplish by implementing your strategic communications plan and define them as your objectives. Consider the following when drafting this section:

- Define objectives using the SMART method, meaning specific, measurable, achievable, relevant, and time-bound. Using the SMART method ensures that objectives will be clearly stated and defined.
- Build on strengths and opportunities and handle weaknesses or threats identified in the SWOT analysis done in the Research and Information Gathering stage.
- Encourage adaptability because objectives may change as you move forward; review your communications strategy regularly to ensure that your objectives are clear, attainable, and still relevant.

Example:

Through discussions, surveys, and audit of Phase 1 materials, and other research, [organization name] has developed an understanding of Phase 2 goals and what will be needed to achieve these objectives. Using the SMART goal method (specific, measurable, attainable, relevant, time-bound), we will:

- Add at least three new employers to our employer network every quarter.
- Increase physician engagement and referral rates in [targeted geographic area] by 15% within the first year.
- Enroll at least five new participants in RETAIN each quarter from the five new counties.

Identify Target Audience and Key Messages



In this section, separate your general audience into tiers and determine which messages are most appropriate for which audience(s). Consider the following when drafting this section:

- Describe all the key audiences that your organization could approach and divide them into primary, secondary, and tertiary audiences.
  - Your primary audience will be the direct, consistent recipients of your RETAIN SAW/RTW assistance, such as participants.
  - Your secondary audience will be the partners with whom you should consider collaborating, such as the state/local department of health.
  - Your tertiary audience will be those who could help maintain and increase the longevity of RETAIN, such as lawmakers at various levels.
- Determine and describe the specific messages you want to convey to each type of audience.
- Consider organizing the target audiences and key messages in a table or chart.
- Determine/identify how your key audience(s) are hearing about RETAIN and build on those media.
- Consider how your audience will relate to the message, and tailor your language to ensure understanding of the key message(s) about RETAIN and your organization.
- Use data to inform your decisions on targeting key audiences. Demographic data can be acquired from the U.S. Census Bureau, U.S. Bureau of Labor Statistics, or other sources.

Example:

This strategic communications plan will address and target key audiences through direct and indirect communications. Our key audiences are health care professionals (e.g., physicians),

employers, and potential participants. In addition, our audience also includes community and government partners. These audiences are divided into primary, secondary, and tertiary audiences depending on the specific key message.

Target Audiences		
Primary	**Secondary**	**Tertiary**
• Employers • Potential participants • Health care professionals (e.g., physicians)	• State departments of labor (current/prospective) • Regional/local workforce development agencies (or equivalent) • Local/state health departments (or equivalent) • Local/state chambers of commerce	• Nonprofits • Local community partners • State/local legislators and staff • Federal agency partners

Key Messages		
Primary	**Secondary**	**Tertiary**
• Physicians/health care workers have the ability to help participants/employees remain in the workforce. • Partnering with RETAIN can assist employers with any costs for reasonable accommodations under the Americans with Disabilities Act (ADA) laws for employees with disabilities or medical conditions to help them SAW/RTW. • Financial incentives exist for employers who hire individuals with disabilities.	• Agencies with responsibility for state workforce, vocational rehabilitation, and health and human services are better positioned to put SAW/RTW into practice. • Collaborating with our organization will help participants/employees remain in the workforce—enabling them to increase their earning potential.	• Workers leaving the workforce due to illness/injury can negatively impact tax revenue and increase public assistance spending. • Federal agencies that incur the bulk of cost from disabled workers are not best positioned to implement SAW/RTW services. • Most ADA accommodations are inexpensive and/or easy to implement.

Determine Strategies and Tactics



In this section, lay out your general approaches and the specific things you will do to achieve the already defined objectives. Consider the following when drafting this section:

- List the strategy for each objective and describe the tactics to be used as part of that approach and its audience(s).
  - A strategy is designed to achieve the objectives (i.e., the approach).
  - Tactics are the individual actions and steps taken to implement the strategy (i.e., tools).
- Use clear, direct language. Consider using a table to organize strategy, tactics, and audience.
- Consider the costs—and potential benefits—of each strategy. For example, if you plan to engage more physicians (the strategy) through direct paper collateral (the tactic), such as mailers, include the associated financial costs in your budget.
- Consider using the PESO model for assistance to build out specific media-oriented strategies and tactics:
  - **P**aid media—Promotional efforts that involve paying for placements on third-party channels via social media ads, sponsored posts, and native advertising
  - **E**arned media—Buzz generated by the public through methods such as public relations and word of mouth
  - **S**hared media—Content on social media channels designed to drive engagement between a brand and its audience
  - **O**wned media—The channels you have complete ownership of, such as your website, blog, events, and so on
- Consider which media will be most effective at reaching your target audience; for example, a phone survey may be more appropriate than one conducted via the internet in geographic areas that lack access to reliable internet service.

Example:

To achieve the RETAIN Phase 2 strategic communications objectives previously mentioned, this plan will discuss three main strategies and tactics.

Employer Outreach and Collaboration

To support our objective of adding at least three new employers to our employer network every quarter, the first strategy we will implement is to reach out to and collaborate with employers. We will implement a PDSA, or "Plan, Do, Study, Act," cyclical process to manage the relationships. This tactic will enable us to analyze current materials for improvements. We will develop new materials, such as webinars, briefs, blog posts, and newsletters, to effectively reintroduce RETAIN in our interactions with employers. Other tactics may also include, but are not limited to, developing fact sheets/infographics/FAQs, social media campaigns, and utilizing other resources or suggestions from the RETAIN Online Community (ROC).

Physician Engagement and Promotion

Because physicians were the main source of referrals, our objective is to increase physician engagement and referral rates in [targeted geographic area] by 15% within the first year.

Our second strategy is to continue to engage and promote physicians and other health care professionals. We plan to engage physicians and health care professional through direct mailings to their offices about RETAIN, referrals, and [organization name]. These tactics will inform potential physician partners about RETAIN and how they can refer their patients. We will create pamphlets that physicians can distribute to potential participants in their offices. We plan to promote physicians with success stories posted on our social media accounts, as blog posts, and on the ROC. Both the participant and the physician will need to sign a release form and approve the story, including any photos, before it is disseminated.

Participant Engagement and Outreach

To support our objective of enrolling at least five new participants in RETAIN each quarter from the five new counties, we will implement a participant engagement and outreach strategy. Our tactics to ensure successful expansion into the new territory are to use county-targeted direct mailers, design and introduce a social media campaign, and run targeted TV ads on local news stations. We will also host virtual and in-person events to increase engagement. Because TV ads have increased in price, they will be a limited part of the outreach. However, our social media campaign relies mainly on free platforms, helping to cut costs. We will develop a content calendar and plan our social media messaging in advance.

Implement Strategies



Implementing a strategic communications plan involves more than determining audiences, messages, or strategies. To successfully implement the plan, you must also be aware of certain constraints, such as budget and timing. Examining these factors as part of your strategic communications plan implementation process enables you to make any necessary logistical changes early, track your progress, and make other changes early in the process of executing your plan.

Budget

Use this section to discuss and demonstrate how you are allocating your budget. Consider the following when drafting this section:

- Define your major expenses and estimated costs in a spreadsheet for tracking and accounting. As you spend each month, deduct that amount from the appropriate place in your budget.
- Consider organizing your major expenses under general categories, such as staff labor or media relations.
- Consider using a more automated system to track your budget, such as Smartsheet, Monday.com, or QuickBooks. If cost is a concern, an Excel Spreadsheet will work just fine.
- Determine how often to update the budget as necessary to ensure alignment with funding.

Example:

Category and Program Element	Estimated Cost Q1	Actual Cost Q1
Overhead		
Staff	$15,600	$17,000
Rent	$2,000	$2,000
…	…	…
Outreach		
Social media campaign	$150	$220
Print campaign volunteers from local organizations	$0	$0
TV ads	$12,000	$11,950
Printing/paper	$500	$235
…	…	…
…	**…**	**…**
TOTAL	**$67,525**	**$62,762**

Timing and Execution

This section includes your timeline, which is designed to keep the communications plan on schedule during execution. Consider the following when drafting this section:

- Be based on your research and objectives and create a feasible, realistic timeline by which to execute your strategic communications plan.
- Help create a work plan to organize your key tactics, descriptions, and deadlines. Consider using tools like Gantt charts to visually depict the timeline.
- Consider using collaboration and management software or online tools such as Monday.com or Smartsheet to plot out your timeline, view it visually, and track execution progress.
- Update your timeline as appropriate.

Example

Tactics	Description	Target Audience	Frequency/ Deadline	Status
STRATEGY: Employer Outreach and Collaboration				
Fact sheets/ Infographics/FAQs	Easy-to-read and understand information to supplement outreach efforts	Employers	As needed, 6/30/21	Completed RETAIN fact sheet, FAQ on enrollment in progress
Emails/listservs newsletters	Disseminate information, success stories, tools, and resources	Primary	Monthly, second Tuesday of the month	5/12 completed for Year 1; August draft in progress

Review and Debrief



This section should discuss how you will determine the success of your communications plan, share that information internally, and discuss lessons learned. Consider the following when drafting this section:

- Define a process for how you will conduct internal assessments and regularly debrief staff on progress toward completing your objectives.
- Determine what success looks like for each tactic you have employed, how to measure that success, and what determines completion.
- Meet regularly as part of your program's continuous quality improvement efforts to discuss progress, areas for improvement, and any other necessary adjustments or action items. This should be an ongoing process of interacting with a living document, and not just applying a rubric.
  - Take notes during these meetings for future referral and reporting purposes.

Example

We will have all staff meet monthly to discuss and document progress on our communication strategies and objectives. These meetings will be recorded and notes provided to staff as a meeting summary. All the files can be located [insert repository link] here. Leadership will meet quarterly to discuss the budget, progress on strategies, and any other relevant issues. In addition, teams will meet on a weekly basis to discuss tactical progress and challenges.

We will measure the success of our strategic communications plan through qualitative and quantitative measures, such as changes in perception and engagement with RETAIN, number of new monthly subscriptions to the newsletter, number of products developed, and any other ways that align with any [additional mandates] or [initiative mandate] as necessary and/or appropriate.

Appendix: RETAIN Strategic Communications Plan Sample Template

The RETAIN State Strategic Communications Plan Sample Template (Sample Template) is designed to be used in conjunction with the RETAIN Strategic Communications Plan Guide. The Sample Template replicates the format described in the Guide. Used together, these will lead you through the process of organizing and planning communications regarding RETAIN outreach to employers, participants, and health care providers.

The Sample Template provides a model of an effective organizational structure for a strategic communications plan, but please note this is not the only way to organize a strategic communications plan. It is an example designed for you to customize to meet your state's RETAIN communications needs and goals.

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Overview or Executive Summary

Insert text here.

Communications Goals

Insert text here.

1.
2.
3.

Background

Insert text here.

Sample SWOT Analysis Table:

Strengths	Weaknesses
• Text • Text • Text	• Text • Text • Text
Opportunities	**Threats**
• Text • Text • Text	• Text • Text • Text

Objectives

Insert text here.

Target Audience and Key Messages

Insert text here.

Sample Target Audience and Key Message Organizer:

Target Audiences		
Primary	**Secondary**	**Tertiary**
• Text • Text • Text • Text	• Text • Text • Text • Text	• Text • Text • Text • Text
Key Messages		
Primary	**Secondary**	**Tertiary**
• Text • Text • Text • Text	• Text • Text • Text • Text	• Text • Text • Text • Text

Strategies and Tactics

Insert text here.

Implementation

Insert text here.

Budget

Insert text here.

Sample Budget Table:

Category and Program Element	Estimated Cost Q1	Actual Cost Q1
Category		
Element		
Element		
Element		
Category		
Element		
Element		
Element		
Element		
Element		
Category		
TOTAL		

Timing and Execution

Insert text here.

Sample Strategy and Tactics Outreach Plan:

Tactics	Description	Target Audience	Frequency/ Deadline	Status
STRATEGY: Employer Outreach and Collaboration				
Tactic	Description	Audience	Frequency/ Due Date	Current Status
Tactic	Description	Audience	Frequency/ Due Date	Current Status

Evaluation



Insert text here.

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