

Audit for (include state): _____

**Capacity Framework
Recruitment and Engagement of New Stakeholders**

Key Elements of a Successful Local Marketing Strategy	Proposed State Level Action	Actual Capacity at State level	Actual Capacity at Local Level
<p><i>Strategic marketing and recruitment plan</i></p> <ul style="list-style-type: none"> ○ Should include measurable objectives for the community or region, a clear sense of target audiences, key messages, and strategies to reach the target audiences with the messages in service of the objectives ○ Basic evaluation plan should be able to gauge success on these objectives 	<ul style="list-style-type: none"> ○ Should include measurable state objectives, a clear sense of target audiences, key messages, and strategies to reach the target audiences with the messages in service of the objectives ○ State evaluation plan should be able to gauge success on these objectives 	<ul style="list-style-type: none"> ○ 	
<p><i>Access to high quality materials</i></p> <ul style="list-style-type: none"> ○ Logo ○ PPT presentations, including Class 0 presentation ○ Brochures 	<ul style="list-style-type: none"> ○ Statewide commitment to use common branding, name, look and feel ○ Passwords or other 	<ul style="list-style-type: none"> ○ 	

<ul style="list-style-type: none"> ○ Posters ○ Direct mail letters ○ Community notices ○ Newsletter stories ○ Radio or print PSAs ○ Photographs ○ Banners ○ Videos and video clips ○ Toolkit for outreach to doctors and healthcare providers ○ Tools for participant and other champions to carry the message to key stakeholders. 	<p>access to CHA Web site and materials</p> <ul style="list-style-type: none"> ○ Training and support in the use of the materials ○ Development/adaptation of new materials on an as needed basis 		
<p><i>Staff expertise or capacity</i></p> <ul style="list-style-type: none"> ○ Trained or knowledgeable staff on communications ○ Community competence and connection ○ Budget or volunteers to produce and stuff direct mail letters, other materials ○ 1.0 or less FTE? 	<ul style="list-style-type: none"> ○ Ability to answer questions, provide support to local marketing/recruitment staff ○ Resources to support local materials printing 	<p>○</p>	
<p><i>Technology infrastructure</i></p> <ul style="list-style-type: none"> ○ Office Suite for manipulating materials ○ Budget or color printer capable of producing brochures/posters ○ Excel or Access database to 	<ul style="list-style-type: none"> ○ Budget or other resources to support printing ○ State Web site to promote CDSMP 	<p>○</p>	

<ul style="list-style-type: none"> ○ manage inquiries and contacts ○ Web site to provide information and accept inquiries ○ Easy to find phone number 	<ul style="list-style-type: none"> ○ offerings (and collect and distribute inquiries) ○ State phone number, if possible, to gather and distribute inquiries 		
<p><i>Relationships for recruitment and marketing channels</i></p> <ul style="list-style-type: none"> ○ Physicians, nurses and local clinicians ○ Hospitals and primary care practices ○ Insurers ○ Senior housing sites ○ Other area aging service providers ○ Faith-based organizations ○ Organizations serving hard-to-reach sub-populations ○ Media 	<ul style="list-style-type: none"> ○ Development of relationships/collaborations with state associations of the organizations or groups described here. 	<ul style="list-style-type: none"> ○ 	
<p><i>Media strategy</i></p> <ul style="list-style-type: none"> ○ Should build from marketing and recruitment plan objectives ○ Would include: <ul style="list-style-type: none"> ➤ Local media list (print, radio, TV, local Internet news) ➤ Story ideas to pitch, particularly related to 	<ul style="list-style-type: none"> ○ Training and support to local providers, as needed ○ Media outreach and connection of state or major media inquiries to local sites 	<ul style="list-style-type: none"> ○ 	

<p>new classes as they come on line</p> <ul style="list-style-type: none"> ➤ Spokespeople (including participant champions, lay coaches, and agency staff) ➤ Talking points/messages with key factoids about chronic disease and CDSMP 			
<p><i>Recruitment and marketing advisory committee</i></p> <ul style="list-style-type: none"> ○ Representation from key marketing channels ○ Meets quarterly or as needed to review progress, address challenges, and identify opportunities for new outreach. 	<ul style="list-style-type: none"> ○ Creation of statewide collaborative to support CDSMP dissemination an marketing efforts 	<ul style="list-style-type: none"> ○ 	