Federal Response Team Playbook: Community Activation in a National Public Health Emergency

MITRE Corporation
7515 Colshire Drive
McLean, VA
www.mitre.org

Contract No. 75FCMC18D0047; 75A50120F80041

Prepared by:

CMS Alliance to Modernize Healthcare (The Health FFRDC)
A Federally Funded Research and Development Center

Updated September 2021

Approved for Public Release; Distribution Unlimited. Public Release Case Number 21-2663

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1 Introduction

Effectively addressing a public health emergency (PHE) requires a broad array of methods, expertise, and authorities. One often overlooked tool is educating the public about the PHE and encouraging them to engage in behaviors that can help control it.

Several government agencies have developed playbooks to guide decision-making and specific plans of action to manage certain types of responses to a declared PHE or other critical event. To date, a playbook aimed at specifically facilitating the development and management of a campaign to motivate behavior change and influence public sentiment during a PHE has not existed. The purpose of this Playbook is to fill that gap.

Community activation, defined as raising awareness and inspiring the public to take a particular action, should be a material component of the incident response ecosystem. This Federal Response Team Playbook: Community Activation in a National Public Health Emergency (Playbook) is designed to be a resource for federal officials intending to create and manage a community activation campaign during a PHE. During a PHE, community activation requires targeted messaging based on the evolving science; rapid analysis and translation of data to operations; unity of effort within the National Response Framework/National Incident Management System (Federal Emergency Management Agency, 2020); and a nimble infrastructure that can rapidly expand, contract, and disseminate knowledge during the response phases. Having a clear plan for creating an effective campaign increases the likelihood that it will successfully navigate these challenges.

1.1 Background

This Playbook is a product of lessons learned during the U.S. Government’s response to the COVID-19 pandemic of 2020-2021. The response included a mission-based partnership among components of the U.S. Departments of Health and Human Services (HHS) and Defense (DoD), originally called Operation Warp Speed (OWS) and later renamed the Federal COVID-19 Response (FCR) team. In June 2020, COVID-19 Convalescent Plasma (CCP) availability was critical for real-time patient treatment and ongoing COVID-19 therapy research. Realizing the need for coordinated public outreach and action, the COVID-19 therapeutics team within OWS established a cooperative partnership with The Fight Is in Us (TFIIU) coalition to amplify CCP collection progress and platforms currently in the public domain. The FCR team developed and executed a successful campaign to engage and mobilize individuals who recovered from COVID-19 to donate CCP at their local donor centers.

1.2 Playbook Audience and Application

The Playbook is intended to support federal officials responsible for rapidly standing up a community activation campaign within the larger response to a public health emergency (PHE). Its information ranges from the strategic to the tactical or operational level, enabling decision-making by individuals and teams to manage their campaign responsibilities and track progress towards varied objectives.
The Playbook approach centers on principles of flexibility and scientific understanding, where decisions and actions are continually informed by the evolving PHE. Many concepts and tactics discussed in the following sections may be executed in tandem and/or repeated in cycles as more information regarding the PHE and its impacts are understood. Federal officials and their partners are encouraged to regularly revisit this information and adjust so strategic action plans and processes are implemented, tested, and refined throughout the duration of the PHE.

Recognizing that a PHE response will be mission-specific, based on federal agency and department missions and campaign team assignments, this Playbook aims to be applicable to any objective that requires an “ask” or specific request of the public, inspiration for action, or motivation for behavior change.

It is important to understand the Playbook’s foundational assumptions:

- The overarching goal for a PHE response is to protect health and save lives.
- The community activation campaign is part of the broader PHE response framework.
- The PHE requires rapid decisions based on the best available data at the time a decision is being made.
- Evolving science must be integrated in real time.
- The scope and scale of a PHE may rapidly expand and contract before ending.
- Knowledge transfer and practice-sharing are needed to support leadership and staff transitions during the response.
- The principles of risk communication, crisis communication, and health communication are foundational to the execution of the Playbook content during a PHE.
- Planning for recovery, transition, and close-out is integral to response.
- Campaign funding and administration will be audited after the PHE ends.

1.3 How to Use the Playbook

This comprehensive resource is meant to be consulted periodically throughout the campaign lifecycle.

It is not expected that the federal team accountable for executing the campaign will peruse the document in its entirety before initiating its work. However, federal officials reading the Playbook can review sections to gain familiarity with its components and disseminate it to team members responsible for campaign goals, objectives, and varying levels of management and governance.
Playbook Structure

To facilitate content navigation to support the various components of the community activation campaign, the Playbook is organized by the phases necessary to manage continually evolving public health emergency (PHE) situations so teams can act with informed awareness in the process: PREPARE, RESPOND, MONITOR & EVALUATE, REFINE, and CLOSE & TRANSITION.

As the phases are sequential and regularly refreshed, depending on changing information, teams may wish to revisit sections throughout the campaign to inform decision-making and oversight.

Navigating sections: each section focuses on a specific phase as indicated in Figure 1. The specific key decisions, activities, and considerations are presented in the context of that phase of the campaign lifecycle.

- **Section 2 - PREPARE:**
  - Guides executive leaders with goals and outcomes that explain how the campaign will support an overall PHE response.
  - Highlights executive and oversight team priorities for the campaign’s first days and weeks.
  - Outlines the strategic planning, governance, and team-building steps necessary to initiate and lead a successful campaign- including standing up a campaign management team.

- **Section 3 - RESPOND:**
  - Guides campaign leaders responsible for planning, launching, and managing the operations of the campaign and the team members charged with executing the work and:
    - Explains the critical steps for campaign response.
    - Describes how to gain a nuanced understanding of the focus community to establish foundations and facilitate outreach efforts.
  - Provides tools and guidance for applying foundational understanding to outcome-driven operational plan development and execution that delivers messages to selected communities.
• **Section 4 - MONITOR & EVALUATE:**
  o Guides campaign leaders responsible for monitoring and evaluating the PHE through the processes for tracking campaign operational progress toward the strategic goals and outcomes.
  o Describes the monitoring and evaluation activities to be performed while the campaign is operational.
  o Includes tools and guidance to manage continuous outputs that facilitate data-driven campaign refinements.

• **Section 5 - REFINE:**
  o Guides campaign leaders through the processes to continually adjust campaign efforts and apply knowledge gained from monitoring and evaluation activities and scientific discoveries during the evolving PHE.
  o Includes examples and tools for planning campaign refinements and counter-messaging.

• **Section 6 - CLOSE & TRANSITION:**
  o Guides campaign leaders as they shift active campaign efforts to close and transition the campaign toward non-emergency operations and outlines key processes.
  o Discusses approaches to assess campaign impact, thank the community, and prepare final reports.
  o Includes tools and guidance to collect lessons learned and record transition activities.

**Navigating the Content:** Each section highlights recommendations and other content with icons to direct attention to specific types of information for additional context or resources. These icons are represented below in *Figure 2*.

![Figure 2. Playbook Content Icons](image)

**Case Examples:** In addition to recommendations to prepare for and execute community activation campaigns, real-world examples or specific learnings from the Federal COVID-19 Response COVID-19 Convalescent Plasma donor activation program are featured throughout the Playbook and flagged by a plasma droplet icon.

**Appendices:** The appendices provide additional tools and templates, examples, context, and resources that may be useful to future community activation teams responding to a PHE. Links to appendices are embedded throughout the Playbook and flagged by icons.

**Glossary:** The Playbook uses industry- or practice-specific concepts, terms, and acronyms that may be unfamiliar to some readers. A [glossary of terms and acronyms](#) is provided for reference.
2 PREPARE for the Community Activation Campaign

This section guides executive leaders with priority actions to accomplish within the community activation campaign’s first days and weeks. It describes the strategic planning, governance, and team-building steps necessary to lead a successful campaign.

2.1 Clarify Mission, Define Scope and Approach

A critical first step is to clarify the mission and define the scope of the campaign and points of coordination in the public health emergency (PHE) response. This drives important decisions regarding who should be involved in campaign decision-making and implementation, the data needed to drive an effective campaign, and the implementation approach. Executive leaders can confirm the mission is clear, with a specific purpose, and ensure the campaign scope aligns to the mission and does not get diluted in tangential actions. As one component of the overall PHE response, the executive leaders confer regularly with other PHE action leaders to report on the campaign progress and ensure the campaign approach is on track to achieve larger PHE response goals.

A tightly constructed campaign scope enhances executive-level decisions and serves as a guidepost for the campaign strategy.

In conjunction with a well-defined mission, it is necessary to conduct the following activities as soon as feasible, ideally within the first week:

- **Identify the affected population.**
  - Understanding who may be affected by the PHE will be a major determinant of the scope of the campaign.
    - What is the scale? Is it a localized, regional, national, or international emergency?
    - Are some populations impacted more than others? Identifying the impacted population(s) will determine the scope and authorities for the approach.

- **Examine and classify the ideal targeting approach.**
  - One effective method for this task is to examine the issue from a social-ecological context, as illustrated in Figure 3 (adapted from Dahlberg and Krug, 2002). See Applying the socio-ecological model resource and accompanying worksheet for more information.

![Figure 3. Social-Ecological Model](image-url)
• **Determine at what level the campaign approach will be most effective in accomplishing the mission.** The scope can address the following questions:
  - Based on available resources and the public health need, where are the anticipated targeting efforts needed?
  - What is feasible given the time and resources at hand?

• **Inventory existing and potential stakeholder relationships and map engagement levels.**
  - Identify existing advisory groups, education and outreach channels, and partner outreach programs across federal agencies or in the private sector (especially within the science and clinical communities) and determine the level of engagement required for each. See *Sample tools for analyzing stakeholder engagement*.
  - As part of the overall PHE response, consider whether there are any requirements for the campaign to include any groups or program representatives as part of its oversight team or as advisors.
  - Depending on the nature of the emergency, and the scope of the response, a coalition of external partners who contribute expertise and resources toward a common goal may be necessary.
  - It may be the case that the partner organization has existing relationships to leverage for this effort; in other cases, the oversight team will need to pursue new strategic advisory relationships as well as more localized engagements.

• **Determine and plan to obtain the best available data.**
  - Identify the types of data most helpful to determining (or altering) the scope of the campaign and how outcomes are measured.
  - Consider how scientific discovery (clinical and research-based) regarding the PHE will affect the overall campaign’s goals, tactics, and resources. See *Understanding Science during a PHE reference sheet*. Especially during time-sensitive responses to PHEs, emerging scientific real-world data presents both challenges and opportunities for action as it is discovered.
    - What processes can be integrated into the campaign to embrace available data while pursuing more evidence through research studies and randomized control trial results as they become available?
  - Identify the required processes for handling proprietary data sets to avoid missteps or overpromises.

• **Clarify the response approach.**
  - Consider how the effort will be administered. Is a singular national voice and effort anticipated? Or should the effort be coordinated nationally, but implemented at the state or local level?
- Should campaign materials or spokespersons communicate in languages other than English? Are there linguistic nuances to consider within communities affected by the PHE (e.g., regional terminology or dialects) that could impact oral or written comprehension?
- Should the response be led by a “.gov” or a “.org” voice?
- Should community partners be funded or otherwise financially supported?

**Assess the risk appetite for public-private partnerships.**
- Many benefits can be gained through partnerships with private sector (non-profit and commercial) entities, including expertise, resources, and existing partner relationships.
- Consider sensitivities in how the public may interpret partnerships as selective endorsement of a corporation or other entity, or public expectations that the campaign will achieve an unspoken goal because of a partner’s involvement.
- Consider methods to be as transparent as possible regarding the nature of public-private partnership roles and contributions, and how the team may prepare for unforeseen events that affect partner contributions to the campaign.

### 2.2 Establish an Oversight Team

A well-run oversight team accountable for the campaign and its contributions to the government’s public health emergency (PHE) response is key for campaign success. Campaign scope and mission will influence the decision to establish a separate group with highly specialized skills and expertise to maximize effective campaign response, or to bring those roles into the oversight team.

A high-functioning oversight team relies on each member’s contributions. As leaders and team members are selected, the oversight team should establish clearly defined roles and responsibilities. See *Example oversight team roles, responsibilities and attributes of leaders suited to each role*.

In conjunction with selecting team members, establishing a governance system sets the tenets for effective and efficient public services and defines expectations during the campaign. The governance system provides the processes to guide the “oversight function that is aligned with the organization's governance model and encompasses the [campaign] lifecycle” (Project Management Institute, 2013).
The oversight team establishes the campaign development lifecycle (see Figure 1). as their approach for campaign operations and assigns to the team various functional responsibilities for each phase. Specific oversight team responsibilities for each phase are described below.

Prepare: During this phase, the oversight team typically has limited information and is focused on quickly learning about the PHE and its effect on populations. Its central purpose initially is to equip the campaign for success. When indicated, the oversight team should:

- Rapidly stand up a campaign management team (CMT) with a clearly defined leader and distinct campaign responsibilities as soon feasible after mission assignment (See Establish a Campaign Management Team).
  - The decision to stand up a CMT is dependent upon the range, dynamics, as well as the expected duration of the PHE.
- Work with the CMT (if established) to determine the campaign’s desired outcomes (See Define Desired Outcomes), potential impact factors (See Identify Factors that May Impact Campaign Success), close-out strategy (See Develop the Campaign Response and Close-Out Strategy), and monitoring and evaluation framework (See Establish the Monitoring and Evaluation Framework).

Respond: During this phase, the oversight team focuses on the development of operational plans. The oversight team is accountable for formally launching the campaign and approving execution plans that conform to the campaign strategy and goals. If a CMT or management working group is not established, they are also responsible for the day-to-day campaign operations. During this phase, the oversight team should:

- Determine how the federal government will seek community support to meet the mission.
- Identify, track, and mitigate risks to ensure mission success.
- Make decisions to ensure that the overall strategy is followed.

Monitor & Evaluate: During this phase, the oversight team reviews insights obtained by monitoring the evolving PHE, how scientific discovery influences population health guidelines, and the effect of the campaign’s operational activities on the PHE. Using this information, the oversight team makes data-driven decisions on how to apply the campaign resources. During this phase, the oversight team should:

- Review insights and follow the decision-making framework to ensure all decisions are data-driven and tracked.
- Make decisions to adjust the strategy and operations to ensure campaign goals and desired outcomes are on track to be achieved.
- Report to executive-level senior officials.

Refine: During this phase, the oversight team and the CMT (if established) co-manage decision-making to adjust the campaign based on the evolving PHE and insights gleaned from monitoring and evaluating campaign operations. This includes the responsibility to:

- Record all changes and track progress. If large changes are sanctioned, action plans for specific campaign actions, such as communication or outreach, should be developed and approved for implementation by the CMT.

Close & Transition: During this phase, the oversight team determines when and how to close and transition the campaign. Transparent action plans and lines of responsibility can secure
campaign materials and allow the campaign to reinforce objectives and facilitate a smooth adjustment to new leadership or oversight. During this phase, the oversight team should:

- Develop and execute the close-out and transition plan.
- Analyze and report on the campaign’s overall impact on the PHE.

With effective planning, preparation, and delineation of roles and responsibilities, the campaign PHE response helps leaders manage uncertainty and ensure the campaign remains an effective component of the overall PHE response.

2.2.1 Establish a Campaign Management Team

A CMT is charged with implementing the overall campaign strategy, direct execution of the campaign operations, and day-to-day activities (see Appendix B). Ideally, the CMT - with a designated leader - should be stood up within two weeks of mission assignment. See the campaign management team stand up worksheet.

The oversight team should identify a single individual to speak on behalf of the CMT who reports regularly on campaign progress. The oversight team should empower the CMT to make decisions on tactical and operational risks that affect campaign implementation objectives to ensure responsiveness to timely developments and opportunities. Decisions on matters that pose significant risk to the campaign’s strategic outcomes should be elevated to the oversight team.

Additional CMT responsibilities include:

- Coordination
- Communication
- Performance tracking and progress reporting to the oversight team
- Staffing and training
- Knowledge sharing and transfer
- Budget audits
- Risk management

Like a program management office model, the CMT model also establishes, improves, and communicates processes that support the mission and align the team governance structures. Often, many activities occur simultaneously, such as the development of the CMT structure and development of the campaign response and close-out strategy.

In preparing for the community activation campaign, the oversight team should assess how best to structure the CMT, and budget accordingly to support its work throughout the duration of the PHE.

The oversight team can evaluate several structural considerations when deciding the CMT’s scope of operations. These are listed below:
• **Identify which functions are required to execute the campaign response strategy.**
  - This should include risk management, cost management, staffing models, communication models, and budget management.
  - Staffing models could include experts in the medical field, health communication science, media, digital services, community engagement, project management, and risk management.

• **Rapidly assess external contracting or grant needs to enable CMT operations.**
  - Determine if internal federal staff (within or across agencies and departments) have sufficient expertise across multiple necessary disciplines (e.g., knowledge management, performance management, schedule management, quality management, and change management) to support the CMT’s work.
  - Allocate budget, contracting, or staffing agreements for contract support or detail requisitions for the duration of the PHE.

• **Develop an organizational structure that aligns with the CMT functions.** Include CMT leadership and definition of roles, responsibilities, and key stakeholder groups. See the example CMT Structure with Roles & Responsibilities.
  - See Figure 5 for an example of organizational structure based on functions. Some of these functions could be managed together (e.g., media, communication), provided the team members’ expertise and time allocations are sufficient to effectively manage activities.

• **Identify the tools and systems needed to support CMT structure and functions.**
  - Confirm whether new software is required, or if existing resources can be reallocated. Determine if open source or proprietary services are appropriate, and whether the technology adequately protects privacy and security. Decide whether the oversight team also needs access to the CMT’s tools and systems for decision-making.
  - Develop processes to manage all activities, communications, and outputs. Determine reporting, data, and information requirements, and ensure data use agreements are completed.

• **Determine budget requirements and constraints.**
  - Resources are finite, even during an emergency.
  - How much funding is available to support the efforts? What are the budget allocation requirements, authorization requirements, timelines, and funding mechanisms?
    - Determining this up front will impact decisions about how to allocate resources on priority actions to reach campaign goals.
    - Budget limitations may also influence the extent to which partners and/or state and local staff may be asked to contribute in-kind support.

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**Figure 5. Example Campaign Management Team Organizational Structure**
2.3 Define Desired Outcomes

Based on its mission and scope, the oversight team must define appropriate strategic outcomes and goals and establish metrics and data sources to assess the community activation campaign’s progress and its ultimate success. See example outcomes and metrics.

Figure 6. Stages of Community Activation

Social science research advises that people must hear a message a minimum of 10 times to remember and act on it. To change a behavior, people must first be aware of the desired behavior (social awareness), they then will need to know why this behavior is important and how to do it (community education). At this point, individuals will begin to understand the desired behavior and make a commitment to act, potentially taking a small step such as completing an online questionnaire (community understanding and commitment). Behavior change is achieved when an individual understands the behavior and is confident in their ability to perform it (community activation). Repetition in messaging is key for each of these stages (Cacioppo & Petty, 1979).

2.4 Identify Factors that May Impact Campaign Success

Foundational to effective campaign strategic planning, the oversight team must be grounded in a collective understanding of the opportunities, threats, potential blind spots, or key factors that may impact the campaign.

While other steps in the preparatory stage should be completed as quickly as possible, performing foundational scans and resilience plans can be initiated concurrently as the oversight team addresses other priority items. These initial scans are necessarily incomplete and require additional research and analyses for deeper insights to design, launch, and execute the campaign (See Respond).
Several techniques, strategies, and frameworks may be helpful to inform strategic plan development and implementation of action plans:

- **Environmental scan**: An environmental scan allows for evaluation of existing resources, relationships, and capacity within and across federal agencies to develop and manage the campaign.
  - The environmental scan may also identify areas where external support would augment federal engagement to expedite or enhance campaign activities and achieve specific goals or milestones, such as when working with federally recognized Tribes or in communities that emphasize guidance from religious leaders.

- **Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis**: Conducting a SWOT analysis helps the campaign anticipate how it may be received by stakeholders and prepare for potential criticism. It also identifies the campaign federal sponsors’ strengths and opportunities that can be leveraged as part of the strategy.

- **Strengths, Opportunities, Aspirations, and Results (SOAR) analysis**: An alternative to SWOT, the SOAR is more future-oriented than SWOT and addresses accountability through outlining results.

- **Road Testing**: A road test is an iterative, rapid prototyping approach used to refine the design and implementation of a program strategy or intervention (U.S. Department of Health and Human Services, 2018).

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**Road Testing**

In August 2020, the Federal COVID-19 Response (FCR) successfully executed a road test of its COVID-19 Convalescent Plasma Donor Activation Program as it launched in the Houston, Texas Metropolitan Statistical Area (MSA). FCR conducted an environmental scan to identify appropriate avenues of dissemination and released digital campaign materials to promote convalescent plasma donations. FCR used the road test in the Houston MSA to refine the SWOT Analysis and inform additional successful launches throughout the country, which eventually helped the campaign contribute to the collection of more than **600,000 units of plasma**.
2.5 Develop the Campaign Response and Close-Out Strategy

A strategic plan is the source documentation to craft the campaign design and implementation plans. It drives how success is evaluated and, judgements on whether the campaign has reached the point or closure or transition, and states how activities will be executed to achieve the campaign’s mission. It should communicate the campaign’s intended impact, outcomes, and goals along with the tactics and timeline.

This planning effort requires a significant amount of oversight team collaboration to align the strategy with concurrent public health emergency (PHE) response efforts.

Consider a strategic planning tool, such as a logic model (Centers for Disease Control and Prevention, 2018) to help illustrate the shared relationships among inputs from resources, activities, activity outputs, outcomes, and impact for the campaign. This will provide transparency to the thinking behind campaign design and show how specific campaign activities will lead to the desired results. See [the example logic model and a template](#).

Key Elements of the Response and Close-Out Strategic Plan

- **Campaign Desired Outcomes** ([Define Desired Outcomes](#))
  - Determine what the campaign aims to achieve.
- **Campaign Priorities and Timeline**
  - Identify campaign priorities.
  - Create a timeline for how and when the campaign will initiate activities.
    - Assess how campaign priorities will be met in the near and longer term.
    - Establish criteria for campaign launch.
    - Develop milestones the campaign will meet as it progresses toward the desired outcomes.
- **Campaign Audience**
  - Declare who the message recipients will be and if these may change over time.
- **Campaign Message(s)**
  - Identify what the audience will be asked to do, how they can do it, and whether that request will change over time.
- **Campaign Messengers**
  - Provide guidance and conditions for the types of groups the campaign will recruit to deliver and amplify the messages.
- **Message Delivery: Strategy and Tactics**
  - Specify how the campaign will maximize message impact with the audience.
- **Campaign Resources and Strengths**
  - Document the consequential factors the campaign can leverage now and over time. Use the campaign management team budget and relevant analyses ([Identify Factors That May Impact Campaign Success](#)).
- **Campaign Risks, Challenges and Gaps**
  - Plan for how the campaign will mitigate and reduce barriers caused by internal and external factors.
- Campaign Road Testing ([Identify Factors That May Impact Campaign Success])
  - Create methods so the campaign can know if its approach and actions are working as intended. Consider what plans need to be in place to test, adjust, and redeliver messages or methodologies.
- Campaign Transition and Close-Out Strategy
  - Identify triggers or signals that will indicate the campaign can end or transition. Assign team members to prepare plans to transition or close the campaign.

2.6 Establish the Monitoring and Evaluation Framework

A data-driven monitoring and evaluation framework is essential to determine whether the current activities are adequately calibrated to achieve the intended mission outcomes or whether adjustments are needed.

It is important to develop and finalize the framework and supporting infrastructure early in the campaign planning stage. Framework decisions also influence budget considerations, data availability, and tools design. Establishing and corroborating the framework early allows the campaign work to initiate quickly and will begin to inform leaders whether the overall strategy is sound.

The framework provides information so the campaign team can focus efforts on activities that successfully achieve the mission.

- Regular monitoring and evaluation as a campaign process norm supports the teams’ ability to act decisively on changing data and scientific discovery.
- Monitoring and evaluation are continual processes that allow the oversight team and campaign management team (CMT) to track decisions’ effects on campaign results.

Campaign execution requires iterative adjustments, collaboration, and communication with other team members. The framework provides guidelines for transparent decision-making and methods to for implementing and communicating changes required to the strategic, tactical, or operational plans. See the example monitoring and evaluation framework template.

Key Decisions and Activities to Establish the Monitoring and Evaluation Framework

- Define the performance indicators and metrics and align data to campaign decision points.
  - The framework must be structured to correlate data and metrics to the desired outcomes, which are tracked at the strategic and operational levels.
  - The framework should also include explicit requirements for review. See the example outcomes and metrics.
- Determine if existing data is sufficient or if influential data gaps should be addressed.
  - Identify required data sources (current and yet-to-be measured).
  - Create proxy measures if they are not available or do not yet exist.
  - Determine whether data use agreements and/or data disclosures are required. The Department of Health and Human Services (HHS) and several divisions
have developed guidance for data access and use (HHS, 2017; Centers for Medicare & Medicaid Services, 2021).
  - Create a streamlined data collection and coordination plan that focuses on essential information.
  - Develop and standardize methods for data analytics and visualization to streamline decision-making.
    - Monitoring progress on strategic, tactical, or operational goals likely requires designing separate but integrated visualization tools, such as dashboards or other resources.
    - Each team member may rely on different data sources to track fluctuations in campaign effectiveness and appropriate data communication to support consensus understanding for decision makers.
  - Develop reporting structures and cadence.
    - Clarity between the oversight team and the CMT regarding what will be reported, its frequency, and methods is critical. Decisions also should address how more detailed reporting to other entities, including the overall public health emergency response leadership, will be managed if it becomes warranted later.
  - Draft a stakeholder reporting plan.
    - In addition to internal reporting, determine whether, when, and how progress and outcomes will be reported to the public and other stakeholders.
  - Develop a decision framework that will formulate campaign response options and track decisions.
    - A decision framework for response options can assist implementers to identify options and potential differences in outcomes depending on the chosen option.
    - Include a decision tracker that records data availability and under what conditions decisions were made. The tracker should follow governance principles established earlier between the oversight team and CMT.
  - Begin planning for overall campaign outcome and impact evaluation efforts (Close and Transition the Campaign).
    - Determine if pre-test measures are needed for campaign impact evaluation.
3  RESPOND: Develop and Execute the Community Activation Campaign

This section provides guidance to the oversight team, the campaign management team (CMT), and other team members to plan, develop, and execute the community activation campaign through a foundational understanding of the community that informs the strategic approach to development and dissemination of campaign content.

Campaign development and execution are cornerstone actions that require the oversight team and CMT to coordinate closely on strategic and tactical decisions - including determining readiness for initial launch. Leaders should remain agile and responsive throughout the campaign execution, continuously monitoring, evaluating, and refining activities based on data collected throughout the campaign (Monitor and Evaluate and Refine the Campaign).

3.1 Understand Communities

To build a successful campaign, it is paramount to first understand the community or communities of focus. Who is the target audience for the message(s), what do they care about, and what are they being asked to do? These questions are the basis for foundational research, which, combined with various other techniques, provide a baseline understanding of the community. For example, research efforts could include community environmental scans and social media analyses.

In conjunction with developing a comprehensive awareness about the communities the campaign intends to reach, it is essential for campaign team members to understand the status of clinical science and regulatory activity, their potential impact on the community, and public sentiment regarding government regulations and clinical science. Grounding the CMT in an understanding of how federal or local regulatory decision-making and policies play into the evidentiary science, and vice versa, is central to building effective outreach materials, talking points, and frequently asked questions (FAQs).

3.1.1 Assess the Emergency’s Impact Upon Communities

A public health emergency (PHE) can impact different segments of the population in distinct ways. Systemic factors, such as discrimination, poverty, lack of transportation and energy sources, access to healthcare and education, and housing issues are intertwined and have a significant impact on an individual’s health and quality-of-life (Watson et al., 2020).

Whereas one community may appear resilient and relatively untouched by a crisis, other communities may suffer a disproportionate burden. Health insurance access and coverage, access to technology (e.g., smart phones, internet), employment status, immigration status, language skills, access to healthcare facilities, and feelings of being left behind may compound these existing inequities.
Community and individual social norms, values, politics, and health beliefs will also influence behavior during an emergency. These collective cultural aspects impact where community members seek information and whom they trust as messengers. They generally have deep roots in a community and can sometimes be related to historical injustices. Continuously bearing the brunt of crises can lead to collective trauma that can persist across generations and shape behavioral patterns (Saul, 2013).

Key Decisions and Activities to Assess the Emergency’s Impact

- Identify populations impacted (e.g., by geography and demographics) as well as any existing and potential disproportionate impacts.
- Determine population segments and focus communities based on campaign objectives, noting that resource constraints may necessitate difficult decisions to prioritize certain segments in the response.
- Develop a framework to continually monitor and assess the emergency’s ongoing impact on communities as part of the monitoring and evaluation framework (Establish the Monitoring and Evaluation Framework). Consider incorporating data from vulnerability indices like Center for Disease Control and Prevention’s (CDC) Social Vulnerability Index (CDC, 2021).

3.1.2 Conduct an Audience Analysis

An audience analysis will help the campaign understand the attributes of people within the community of focus, as well as considerations within their specific environments, to provide a robust comprehension of the factors that motivate and contribute to health behaviors (Maibach, Abroms, and Marosits, 2007).

Key Considerations to Understand the Audience

- Social norms, values, beliefs, fears, and social networks can impact health information-seeking and active engagement in wellness and disease prevention.
- By understanding the characteristics of each community and preparing a generalized model or “persona” for the community of focus, these insights can be applied to the strategic and tactical decisions for community activation.
Focus groups, community advisory boards, in-depth interviews, questionnaires, and/or surveys can be used to study the community of interest. Consider each methodology’s advantages and disadvantages in terms of time to complete, cost to execute, quality of research, potential bias, and impact to the community. See the example interview discussion planning checklist and cultural considerations for guided interview development worksheet.

Key Considerations to Understand the Audience’s Environment

Conditions in the places where people live, learn, and work affect health risks and outcomes. Vocation, living spaces, and community geography may make it difficult for individuals to avoid exposure, potentially exacerbating disease transmission. When planning communication campaigns, consider social determinants of health to make appropriate requests of the audience and understand how the message(s) will best reach and resonate with them. Consider the following:

- **Disparities in risk exposure**: During a pandemic, individuals will have unequal levels of possible risk exposure.
  - Essential workers such as bus drivers, clerks, caregivers, and warehouse employees may not have the same ability to be physically distant or as available for community activation requests as individuals from other professions.
  - Individuals in the intended audience may have experienced homelessness or crowded living spaces, such as shelters or multigenerational households, and may not have access to online campaign materials. Consider a broad approach that uses various channels to reach the audience.

- **Health services and accessibility**: Not all communities have equitable access to healthcare providers and services.
  - Identify local health centers or other sites where clinical care or community services are trusted resources for the community.

**Interviews & Guided Discussions**

As part of the COVID-19 Convalescent Plasma (CCP) Donor Activation Program campaign launch activities, the Federal COVID-19 Response (FCR) conducted guided discussions with people from specific Metropolitan Statistical Areas that were significantly impacted by COVID-19. This component of the audience analysis allowed FCR to establish a framework for ongoing systematic data collection and strengthened the campaign with continuous feedback from community partners that informed refinements throughout the campaign lifecycle. Ideally, finding opportunities to host an ongoing community feedback group would enable the capture of continued input to inform the campaign.
Consider if the campaign will be impacted by transportation or other accessibility limitations. If so, identify solutions such as free or low-cost transportation options and extended hours of operation.

- **Underlying health conditions**: Underlying health conditions can disproportionately affect certain populations and can compound hospitalizations and deaths caused by a PHE. Consider the burden of the ask for individuals from these communities and identify solutions that help with translation, understanding, and ability to participate.

- **Health inequities**: Design the campaign to provide equitable benefit to all impacted populations. PHEs can affect under-resourced and underserved communities more than other communities and exacerbate existing negative health outcomes (Assess the Emergency’s Impact Upon Communities).
  - While there may be disparities in outcomes for unknown reasons (e.g., the science may not yet discern why certain treatments are not as effective for certain populations), it is crucial to have a plan to address the needs of underserved and/or disproportionately affected populations and to continuously strive for equitable solutions.

- **Cultural aspects of a community**: The methodology chosen for the analysis must take cultural aspects into consideration with questions designed to understand social norms, values, beliefs, and social networks.

**Other Considerations in Audience Analysis**

As part of the audience analysis, conduct an initial scan of literature and other resources to capture documented behaviors or beliefs.

- An online survey can provide quick, targeted insight. Note that survey questions, the data collection plan, and data analysis should be developed and validated by appropriate subject matter experts. See the example annotated online survey.
  - Data from the survey can be applied across campaign tasks (e.g., refining targeted messages).
  - Note that any public information collection will require adherence to statutory guidance, such as privacy laws and public burden reductions, and that certain information collection activities may need waivers approved by authorities.

When designing a survey, take care to draw a sample of respondents that are reflective of your target audience:

- Establish screening criteria for third party survey administrators.
- Consider honoraria to reach those who do not typically participate.
- Diversify platforms where the survey is available, including plans for in-person administration.
3.1.3 Conduct a Social Listening Scan

Social listening is the process of tracking and analyzing mentions of key words, phrases, or complex queries across social media and the web (Stewart and Arnold, 2018). Social media can help promote access to important health information and can also present challenges to consistent and accurate messaging. Misleading information can spread quickly and reach more people than proven fact-based information through use of fear tactics, uncertainty, and audience lack of knowledge (Sell, Hosangadi, and Trotochaud, 2020). Online misinformation and disinformation pose barriers to effective emergency preparedness and response (Scannell et al., 2021).

The spread of online misinformation (unintentionally misleading) and disinformation (intentionally misleading) detracts from evidence-based conversations and can erode public trust.

Social listening identifies the language used and topics discussed online during the PHE. These analyses can inform the design of campaigns, get ahead of misinformation and disinformation, and identify credible influencers who may serve as trusted messengers for the campaign.

Key Considerations to Conduct a Social Listening Analysis

- **Social listening must be timely.** Online discourse changes rapidly. Real-time feedback from local contexts is ideal, but at minimum, weekly social listening reports should be analyzed.
- **Develop an agile online social listening strategy** that can be continuously refined based on online discussion.
- **Software exists to help systematize social listening.** Examples of social media monitoring software include Talkwalker, Twitter API, and Botometer®.
- **Misinformation and disinformation can be amplified by social bots,** which are computer algorithms that automatically produce online content and interact with humans, trying to emulate or alter human behavior (Allem and Ferrara, 2018). These bots can proliferate messages quicker than organic content from human users, introducing the potential for rapid and broad amplification of misinformation and/or disinformation.

3.1.4 Integrate Scientific Findings and the Research Community

An unwavering commitment to seek and disseminate scientific information in plainly understandable language is fundamental for campaign success. Scientific findings are the guiding principles for stakeholders during a PHE and must be integrated consistently throughout
the campaign. Adherence to continuous scientific integration influences the types of partners and advisory roles included in campaign outreach.

It is likely that accumulated scientific knowledge will lead to changes in decisions at a rapid pace, potentially making long-awaited findings from Randomized Control Trials (RCTs) less impactful. RCTs compare outcomes between treated and untreated or “usual care” patients. It can be challenging to recruit patients into RCTs during an emergency, and it is common for the definition of “usual care” to change within weeks or months.

- In some cases, the PHE may be over before RCTs report out completely. The campaign must balance the desire for RCT outcomes with more timely data from clinical practice and observational research.
- Expect a charged environment as clinicians and regulators grapple with the best available, but potentially incomplete, evidence.
- Experienced physicians and scientists from across the globe will debate the evidence in a public manner, which presents a risk of misinterpretation by media and interest groups.

Scientific Research

With the emergence of the fast-spreading COVID-19 pandemic in 2020, scientific research deviated from traditional release cycles. In this unprecedented scientific environment, FCR balanced its expertise in clinical science and health communication to develop plasma-specific information for consumption by clinical audiences and the general public. Prior to the establishment of the campaign, FCR worked with internal and external subject matter experts from world-class institutions to follow COVID-19 science and monitor the progress of various therapeutics. In future public health emergencies, stakeholders can seek to establish similar alliances to leverage and contribute to emerging bodies of knowledge.
Key Decisions and Activities to Integrate Scientific Findings

- **Identify or establish a clinical and scientific advisory group.**
  - Determine if there is an existing clinical and scientific advisory body available to convene and advise on the crisis as it unfolds. If not, announce the need to the scientific community and quickly establish a group of willing professionals. See example characteristics of a clinical and scientific advisory group.

- **Keep a focus on the groups that are most at risk.**
  - The clinical and research advisory body should take particular attention to review research related to at-risk populations. New solutions designed to help the most disproportionately affected or underserved will ultimately be the most effective at mitigating the disaster for society.

- **Address misinformation and disinformation.**
  - Establish a consistent process and cadence for addressing misinformation and disinformation. Findings from social listening analyses should be shared with clinicians or scientists to help determine if a mitigation intervention is warranted. Based on their review, enhanced public education and countermeasures may be devised to promote a scientifically accurate public discourse.

- **Develop scientific reports with the latest research updates for the CMT and oversight team.**
  - These updates may include recommendations for the communication team on messaging, and/or identifying potential opportunities with trusted voices in the community. Build answers regarding the latest science and research to be readily available for the CMT and others.

- **Engage trusted and credible voices in the scientific community.**
  - Provide media training and tools (e.g., talking points) for those who will be asked to publicly amplify campaign messages.

- **Explain regulatory affairs to stakeholders.**
  - During a PHE, expect a compressed timeline for the development of evidence and the regulatory approvals process for both diagnostics and therapeutics.
  - Typically, it takes years for a new medication to be tested for safety and efficacy, to gain approval as a new treatment, and for public and private health insurers to develop therapeutic payment and administration policies.
  - During a pandemic, it is likely that existing drugs will be re-purposed as potentially helpful, and new treatments may be created. Expect the Food and Drug Administration (FDA) to use temporary designations such as expanded access programs or emergency use authorizations for promising therapeutics.

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Social Listening Scans

FCR conducted ongoing social listening scans to collect information about online convalescent plasma narratives, respond to misinformation, and deploy countermeasures within the time-sensitive social media environment. Analyses from these social listening activities informed tactical campaign refinements and promoted a balanced, fact-based narrative about convalescent plasma.
while more definitive evidence is generated. If indicated, the campaign team must closely monitor this process for updated guidance.

- **Anticipate evolving risk.**
  - Epidemics, pandemics, syndemics, and natural disasters are unpredictable in the short term. The oversight team must evaluate developing risks and anticipate scenarios of both a worsening and an improving crisis. Use the advisory group to help develop solutions for evolving threats. This is a key activity for developing resiliency during a crisis.

### 3.2 Plan the Campaign: Message Development and Delivery

Four major tasks comprise a strong message and delivery plan to raise awareness, educate, and motivate communities to action: leaders must develop a communication strategic action plan, design messages and evaluate their impact, develop creative assets, and leverage appropriate communication channels (Zhao, 2020). The next section describes these four tasks and provides key considerations and guidance for their execution.

#### 3.2.1 Develop a Communication Strategic Action Plan

A communication strategy establishes the approach for the campaign, leveraging insights from foundational research to understand the target audience, how the behavior change will benefit them, and what actions they should take (*Understanding Communities*). The strategy should include specific goals and objectives, as well as an implementation plan to outline tactical decisions and activities, such as development of key messages and optimal communication vehicles to reach the audience (National Institutes of Health [NIH], n.d.).

**Key Decisions and Activities to Develop a Communication Strategic Action Plan**

- **Define the goals and objectives.**
  - Identify the desired health behavior change (goal) and the specific objectives that will support its accomplishment. Make sure the objectives are SMART – Specific, Measurable, Achievable, Realistic, and Time-based.
  - Tie goals and objectives to the desired outcomes of the response strategy.

- **Define the tactical and operational metrics.**
  - Metrics will help measure whether the communication strategy is achieving its desired outcomes.
  - Identify the data sources from the start and establish the baselines to identify progress towards the goals.

- **Develop a budget.**
  - The campaign budget should allocate resources for paid media, advertising, and any associated digital services costs, such as website and other resource development and management, hosting, and internet Search Engine Optimization (SEO).
  - Identify existing resources and address gaps. Confirm whether federal staff or external entities have been tasked with full or shared responsibilities for developing and executing the strategy.
• **Secure production resources.**
  o Identify existing production resources (e.g., video studios, digital services) or work with external entities to develop and maintain campaign-specific supports.

• **Ensure the plan addresses the uniqueness of the target audience.**
  o One size does not fit all when communicating the messages.
  o Leverage results from the audience analysis, partner engagement, and other formative analyses to tailor the communication plan to the intended audiences. Consider how geography, demographics, literacy, culture, and language may affect how audiences interpret planned messages.

• **Include tactics to “pull” the audience into the content.**
  o With the increasing proliferation of online communications and competing pitches for attention, it is easy for the audience to miss online content they do not actively seek (i.e., content that is “pushed” to them).
  o To address this, devise tactics to draw the audience into the campaign by creating engaging content (blog posts, online forums, social media conversations) relevant to the audience’s interest and needs.
  o Use keywords to help drive SEO so the campaign is prominently displayed in organic web search results as the audience looks for related information online.

• **Select communication vehicles that will resonate with the audience.**
  o Determine the appropriate media types (media mix) to best reach the target audience, including specific vehicles (e.g., publications, stations) for each medium. See the sample list of media formats and their key features.

• **Develop or adopt existing crisis communication plans.**
  o The campaign management team (CMT) and the oversight team must also consider whether existing crisis communication plans, federal or local government public affairs protocols, or other specific resources should be consulted or included in the campaign plans in conjunction with larger public health emergency (PHE) plans.

• **Create a tactical plan for community outreach activities and promotions.**
  o This plan could be a tool to share with local officials, organizations, healthcare professionals, and others within specific communities. It should include goals and objectives, tailored messages and talking points, and communication channels to guide conversations with community partners.
3.2.2 Design Messages and Creative Assets

3.2.2.1 Develop the Messages

Several decisions will shape the development of effective campaign messages. Audience analyses and other formative research will inform the message design, so it resonates with the audience and prompts the desired behavior change (Maibach, 1995).

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**Key Message Updates**

The Federal COVID-19 Response (FCR) developed an approach to continually update key messages as the science and public sentiment of COVID-19 shifted, using clinical research and communication science best practices to map messages to common questions arising from community and online engagement. This process allowed FCR to quickly disseminate answers in response to new questions and concerns from the public. FCR shared this information with community partners to ensure all campaign stakeholders were informed and consistent in all communication about convalescent plasma.

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**Key Decisions and Activities to Develop Campaign Messages**

When designing messages to achieve a positive health behavior change, consider the following (MITRE Corporation, n.d.):

- **Amplify community beliefs, values, and social norms.**
  - The audience analysis should have identified features regarding the communities included in the campaign that highlight differences between regions or other distinctions.
  - Chances are that the analyses surfaced a need to address different groups with values, beliefs, and social norms unique to their community.
  - For example, a community’s social norms and values may be that its members do what is best for the greater good. Messages for that situation must positively appeal to the sense of community versus the individual’s needs.
  - By amplifying a community’s beliefs, values, and social norms, the messaging is more likely to resonate and be received by the audience.
  - It is critical to identify the specific beliefs that are related to the campaign-targeted behavior change (Zhao, 2020).

- **Facilitate a sense of personal agency to achieve the desired health behavior change.**
  - In simple terms, this means building the audience’s confidence that they are in control and can achieve the recommended behavior change.
  - If the behavior change is perceived as unachievable by the audience, they are more likely to disregard the message(s) and not adopt the change (Ort, Siegenthaler, and Fahr, 2021).

- **Consider the health literacy of the audience.**
  - Addressing health literacy can potentially reduce barriers to adoption of behaviors and lessen health inequities (Wittenber et al., 2020).
• Use plain language, particularly when talking with a general audience, to ensure everyone can easily understand the information presented to them. This helps to communicate health information more effectively by making the message(s) clear and concise (Greene, Cleary, and Marcus-Quinn, 2017).

- **Consider the use of appropriate visual communication.**
  - Appropriate visual communication can improve decision-making, change attitudes, and reduce risk behavior (Garcia-Retamero, 2013).

- **Communicate scientific truth and clinical guidance.**
  - Team members responsible for outreach and education communication should routinely confer with members of the clinical and research community for scientific guidance in the development of outreach materials and programs.
  - All materials, such as pamphlets, blog posts, radio spots, interview guides, frequently asked questions (FAQs), and social media posts should be designed using updated scientific guidance and use plain language to explain complicated topics.
  - Clinical team members can help integrate the latest clinical guidelines (e.g., from the Centers for Disease Control and Prevention [CDC], NIH, professional societies) into the messaging.
  - Communicate uncertainty regarding disease risk, diagnostics, and treatments with empathy. Practicing clinicians who are accustomed to working directly with patients should be routinely consulted to achieve effective messaging.

3.2.2.2 **Develop Creative Assets**

The materials developed for community activation, the messages conveyed, and the branding design are all incorporated into the campaign’s communication materials, or creative assets. These assets can include such products as brochures, graphics, videos, stickers, personal testimonials, blog posts, newsletters, fact sheets, and posters.
Key Decisions and Activities to Develop Creative Assets

- **Create assets that are culturally appropriate.**
  - Ensure that the language, graphics, and photos used in the creative assets are culturally appropriate for the target audience.
  - When using photos of people, ensure they are representative of the audience, since individuals often will relate to photos of people who are like themselves.

- **Consider including the target audience in asset development.**
  - This approach can consist of a community advisory group or focus groups.
  - Community participation in the development of the assets provides valuable information to ensure that the messaging will resonate with the audience (Allen, n.d.).

- **Develop distinctive brand assets.**
  - Select a logo, font, and color palette that represent the campaign and use these features consistently in all creative assets.
  - This builds strong brand identity for the campaign that is easily recognizable by the audience (Romanuk, 2018).

- **Consider visual communication strategies.**
  - Visuals can simplify complex health messages to make them easier to understand. It is important to consider images that can effectively communicate the message(s) (CDC, 2021a).

- **Consider accessibility in the design process.**
  - For all campaign materials, including the development and hosting of a website with pictures or other graphics, consult an accessibility expert to ensure compliance with regulations like Section 508 of the Rehabilitation Act (1998).
  - This ensures the site, and the graphics are accessible to all visitors (Allem and Ferrara, 2018; U.S. Department of Health and Human Services, 2020). Figure 9 below provides a range of examples of The Fight Is In Us (TFIIU) creative assets used in different settings.
  - It is crucial to make word choices that will be understood by as many people within a community of focus as possible. In all languages, ensure material is written in a plain style so it is accessible to readers of many backgrounds.

- **Develop a process for managing, approving, and storing assets.** This strengthens quality control, adherence to standards, and ease of maintenance.
Institute and adhere to a proper file naming convention for organizational purposes.
As products are developed, modified, and approved, verify that changes to English text or audio are reflected in materials produced in other languages.

3.2.3 Plan Message Delivery to Communities

3.2.3.1 Develop a Communication Hub: Message Delivery via Website Landing Pages

A central hub can serve as an information vehicle for the public to learn more about the PHE and to understand how they can engage within their community. Typically, this hub can be a website landing page that communicates information, provides education, calls users to action, and when the PHE is abated, retires the overall campaign with closing messages and graphics.

Key Decisions and Activities to Develop a Communication Hub

- **Define communication hub content.** Content can include informative text, videos, images and other graphical elements, and bots (software applications that automate simple and repetitive tasks over the internet to connect individuals to additional resources to participate in community activities).
  - Will the hub include external resources or connections to sources not managed by the campaign?
  - Are there disclaimers needed for display in clearly seen formatting to state that these external resources may not be official endorsements or that accessing them may present users with cybersecurity risks?

Web pages should support a narrative that moves the user through these steps:

1. Understand
2. Gain motivation
3. Trust
4. Decide
5. Act
• **Establish clinical and research resources for professionals.** Develop an online resource page for scientific and clinical communities on the hub. Include research articles, clinical guidelines, and key government documents (e.g., diagnosis and treatment guidance from NIH, Office of Management and Budget, CDC, the Food and Drug Administration).
  
  o Create rules of what materials are to be posted. Differentiate between pre-print, peer-reviewed articles, and opinion pieces. *Figure 10* provides an example of the Clinical Research resource page from the TFIIU campaign.

  ![Figure 10. Clinical Research Page from TFIIU Website](image)

• **Determine scheduling and development tradeoffs.** Time is often the most important factor when scheduling development, due to the time-sensitive nature imposed on development activities to respond to a rapidly evolving PHE.
  
  o When time is critical, development decisions must adjust. There is a constant trade-off between development tasks and development time.

• **Define language requirements.** Identify which languages are critical to the success of the community activation efforts.
  
  o Campaign budget and time constraints may mean it is not possible to develop an accessible hub with customized content for all languages in the community activation effort, but it may be possible to develop a selection of high-level written (e.g., FAQs, fact sheets) and audiovisual (e.g., videos) outreach materials in key languages.
• **Decide on national vs. local engagement.** When engaging web visitors, the website may be localized with elements that are familiar to web visitors of a particular geographical area. This approach has the benefits of local impact and familiarity; however, it requires additional development and maintenance work for each version of the website.

  o Another approach is to create a single, national page to engage all web visitors, regardless of their geographic locations. The national approach requires less development work, but it lacks customized web content for visitors’ locations.

Regional Landing Pages

In the COVID-19 Convalescent Plasma (CCP) Donor Activation Program, FCR developed **regional landing pages** to provide geographically specific information about CCP donation in both **English and Spanish**.

FCR used three landing page styles: 1) General Information landing pages to engage donors; 2) Educational landing pages for scientific information about plasma, and 3) “Thank You” pages to communicate appreciation for those who supported campaign activities.

These landing pages were developed quickly and required **24/7 availability** to serve information on both mobile and desktop designs. These landing pages were important to **supplement the campaign activities** to activate communities.

• **Capture analytics.** Measure and evaluate the effectiveness of the website and include this analysis as part of the monitoring and evaluation framework (**Establish the Monitoring and Evaluation Framework**) as a mechanism to drive community activation changes. This starts with capturing website analytics data using various online tools. To capture application-specific metrics such as user behavior and actions, add custom instrumentation to the website software.

  o Some data could be available by default (e.g., website visits and system uptime).

  o Other data is created by adding custom instrumentation to the servers or software. This is a more customized and focused approach to creating useful web analytics data.

  o Development schedules must allocate additional time for adding instrumentation to the software.

• **Consider User Interface (UI)/User Experience (UX).** Address UI/UX through design choices that make a good first impression, encourage users to return, or encourage users to act on an important activity.

  • A clear UI/UX design encourages more website visits and engagement and better outcomes for the campaign. **Figure 11** illustrates the intended UX for the TFIIU regional landing pages.
• **Conduct UX Testing.** Consider using A/B testing, which can provide valuable data for design and development decisions for websites.
  - A/B testing offers two versions of a creative asset, with a single aspect altered to assess preferences for one version or the other. This allows the campaign to analyze user engagement data, providing insight into which approach (A or B) is more effective and should be used in future materials (Hartson and Pyla, 2012).

### 3.2.3.2 Identify and Engage Community Partnerships to Deliver and Amplify Messages

A successful community activation program engages in meaningful, trusted partnerships within the communities of focus. When establishing new relationships or strengthening existing ones with community leaders, be clear regarding any funding mechanisms and expectations in maintaining the relationship throughout the campaign and whether engagement after the PHE is beneficial or necessary. Clearly expressing the level of effort community partners are expected to maintain, whether in specific actions or throughout the campaign, allows partners to evaluate their own resources and assess whether their commitment can be maintained for the duration of the PHE.

These conversations can generate trust and mutual respect between the community and the campaign, demonstrating that the federal government recognizes opinion leaders’ roles in the community, both to address the PHE and to provide insights on potential future issues.

**Key Decisions and Activities to Engage Community Partners**

- **Design a strategic action plan for community outreach.** Design and execute a plan that aligns with the overall campaign response strategy and desired outcomes.
  - This should include stakeholder groups within the communities identified for the campaign, as well as community engagement operational metrics and goals.
- **Assemble a community engagement team.** The team should include individuals who are familiar with the local market and have existing relationships therein.
  - The team serves as primary contact points between the campaign and potential and existing community partners, helping to identify, cultivate, and maintain relationships.
- **Develop or identify a tool for tracking partnerships.** This tool should be like customer relationship management software that tracks contact information, status, and all partnership activity.
- **Research, identify, and vet potential community partners and opinion leaders.** Organize the results based on relevance to the campaign, partner type, and potential impact (e.g., number of members/followers, status as a trusted voice) and track this for planning and future analysis.
- **Ensure there is a balanced mix of partners and leaders.** Depending on campaign goals and focus, partner types to consider can include (but are not limited to) civic organizations, advocacy and professional groups, health systems, local government entities, and religious and cultural organizations. See Figure 12 below for the partner mix achieved in the CCP campaign.
- **Create a mechanism to build a snapshot of the campaign’s community ecosystem.** Combine information from community partner activities to create targets and track metrics such as the number of prospective partners, number of confirmed
partners, partner diversity mix, number of activities completed, activity mix, and activity opportunities.

- This snapshot should be at the overall campaign level and the local level. It may roll up to a dashboard as part of the monitoring and evaluation framework to continue to refine the engagement strategy.
- Use the snapshot as a roadmap to launch the community engagement plan.

- **Identify and engage key organizations and influencers within the community with whom to form partnerships.** Gauge opportunities and obstacles within a region or community, reporting on relevant shifts in local attitudes and behaviors relevant to the PHE and the campaign’s goals.
  - The CMT should coordinate and refine tactics, methods, and materials to maximize community engagement opportunities to meet campaign strategic objectives.

- **Engage medical and public health professionals.** Ongoing education regarding prevention, diagnosis, and treatment is needed by medical and public health professionals as well as the public during a PHE.
  - The research and scientific advisory group can assist in the creation and promotion of lectures, panel discussions, FAQs, and other guidance for professionals.
    - This group informs the campaign and maintains an agile understanding of the threat to communities.
  - Create programs with two-way communication as conduits for gaining information from front-line caregivers.

- **Determine formal and informal mechanisms for engagement.** Set expectations based on agreements and be respectful of partners’ time and priorities. This is especially important if the partners are voluntary.
  - Establish the plan and length of time for partnership operations and confirm agreement and understanding.

- **Determine what actions or activities community partners can perform and what they are asked to do on behalf of the campaign.** Community partners have a range of capacities to perform these requests.

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**Figure 12. Community Partner Mix from CCP Campaign**

FCR Achieved a Diverse Mix of Partners

for the CCP campaign, informed by survey responses regarding trusted voices in the community.
o Divide these requests into high-level and more tactical categories, based on their impact, partners’ usual operating practices, and willingness of partner organizations or individual champions and leaders to take on new roles or serve as spokespeople for the campaign.

- **Ask partners to amplify the message or messages.** This can include campaign materials distribution, specific media production participation, resource development and testing, or more advanced campaign contributions, such as recruiting additional partners or identifying community individuals for campaign activities.

- **Keep partners engaged and be considerate of competing priorities.** To make community partnerships mutually beneficial, maintain ongoing dialogue to respond to partners’ needs. Remain sensitive to their challenges and cultural norms. Be respectful that they also are managing their communities’ ongoing needs while supporting campaign requests. Depending on the partner, make requests easy and straightforward (e.g., provide the ability to copy and paste content to share on their own channels).

- **Communicate that the campaign is temporary and will end or transition.** Being transparent regarding the discrete nature of the campaign at the beginning helps partners to understand what to expect and for how long. It can also help them plan for local long-term sustainability to support their constituency once the campaign ends.

### 3.2.3.3 Message Delivery via Media Channels

The right communication vehicles are critical for the messages to reach the target audience (Zhao, 2020). The audience analysis helps shape decisions on preferred communication channels that could be ideal engagement tools for delivering the campaign message(s). Selecting communication channels not used by the target audience may result in failure to reach and engage them and could hinder achievement of the desired health behavior change.

Communication channels can include traditional mass media such as advertisement placement on television, radio, and newspapers; social media and websites placement; and alternate media forms such as promotional events, social networks, and existing communication channels within the community setting.

**Key Decisions and Activities to Select Media Types and Channels**

- **Conduct a media scan to understand the media environment.**
  o Identify potential media outlets in the community/region of focus and assess their overall tone, target audience reach, and resonance with the campaign. Assess
the disposition of key talent (e.g., commentators, speakers, writers) and decision-makers (e.g., editorial boards) to ascertain alignment of outlets’ missions and goals with those of the campaign.

- **Determine the appropriate media types (media mix) to best reach the target audience.**
  - Include a mix of paid, earned, owned, and social media.
  - Include specific vehicles (e.g., publications, stations) for each medium.

- **Develop a media plan.** See the example planning checklist. The media plan can include:
  - Schedules to prepare for the frequency and cadence of content dissemination, audience interaction, media engagement, and lead times for internal asset approvals and editorial reviews.
  - Considerations for reach (how many individual people will be exposed to the campaign) and frequency (how many times an individual will be exposed to the content).
  - Identification of potential message or content overlap across channels, including similar or competing messages external to the campaign.
  - Plans for media training for influencers and spokespeople.

- **Leverage credible scientific voices.** Consult the clinical and scientific advisory body (Integrate Scientific Findings and the Research Community) or conduct an environmental scan to identify trusted voices within the scientific subject area, including whether those sources are local to a specific community or hold national prominence and authority. Provide media training as needed and leverage their expertise and associated relationships for earned media message distribution, such as editorial posts, town hall sessions, or interviews.

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**Earned Media**

During the CCP Donor Activation Program, FCR struggled to gain earned media coverage for convalescent plasma information and events. The fluid news cycle associated with COVID-19 resulted in inconsistent news opportunities that prevented FCR from maximizing the impact of this media channel. For future efforts, federal campaigns can work closely with their captive media teams to enhance future earned media efforts and execute program goals.
3.3 Launch the Campaign

Depending on the severity of the public health emergency (PHE), leaders may need to launch the campaign before all preparations are complete and should aim to time the campaign launch based on the need to protect public health from immediate harm, rather than on completeness of campaign preparedness.

Campaign leaders must instigate multiple concurrent activities as they prepare to launch education and outreach activities. These efforts generate analyses and resources sufficient to determine when it is appropriate to initiate the campaign, while continuing to collect information after the campaign rollout begins.

Leaders can apply preliminary findings from environmental scans and literature reviews to begin campaign activities, using generalized messaging and existing resources and relationships while completing more thorough campaign research and planning. Campaign leaders can subsequently integrate lessons learned from these early community awareness, education, and activation efforts into more comprehensive campaign plans to improve message effectiveness and expand community partnerships.

When launching the campaign, the oversight and campaign management teams can prioritize campaign action plan components and create a hierarchy for which activities will have the greatest impact immediately and whether others require higher levels of preparation to institute. Strategic implementation and operational planning can include messaging to the public that the campaign will continually monitor the PHE and community needs and adjust the campaign accordingly to achieve strategic objectives.

3.3.1 Test the Messages

Message testing is the process of evaluating different versions of the messages and creative assets during the development cycle. It can help determine which messages or creative assets resonate with the target audience and which inspire the desired actions. Campaign message testing is a critical component in the creation process—small changes to messages can yield significant results.

Methods vary from presenting testing participants with small refinements of an asset or message to solicit feedback, or A/B testing, where different concepts are lined up against each other for evaluation. This can be accomplished via focus groups, guided discussion, surveys or on social media.

Involve the community in the ongoing creative process. Consider building a community feedback and advisory group to provide input on the campaign, contribute to message development, review and test message(s), and advise on message timing (e.g., recognizing important holidays or events).

Consider the community stakeholders and the level of effort requested of the group:

- Who will be invited to participate in the group (e.g., community leaders, public representatives, clinical care providers from trusted health services)?
- What materials, messages, and campaign activities will the advisory group review? How often?
- Determine whether honoraria should be offered for serving on the advisory
4 MONITOR and EVALUATE

Community activation requires consistent monitoring and evaluation to allow both the campaign management team (CMT) and the oversight team to make informed decisions and achieve strategic outcomes. In partnership, the oversight team and the CMT should monitor and evaluate the ongoing public health emergency (PHE) to align campaign performance and activities and promote effective campaign operations using the monitoring and evaluation framework (Establish the Monitoring and Evaluation Framework).

The CMT can manage tactical and operational risk, elevate decision-making to the oversight team to approve mitigation plans that would impact campaign strategic goals or require significant strategic changes, and keep the oversight team apprised of general progress throughout the campaign. The alignment of these components supports risk-based management and executive decisions and allows for rapid implementation of continuous improvements.

Monitoring and evaluation activities and outputs are performed simultaneously while the campaign is operational. This facilitates the oversight team’s ability to make data-driven decisions and to task the CMT with campaign refinements.

4.1 Monitor and Evaluate the Emergency

The full impact of a PHE on a community can develop slowly. It may be difficult for federal, state, and/or local officials to observe, assess, and understand the PHE’s relationships to other aspects of people’s lives. It is sometimes only after an emergency ends that its effects become fully visible (Knowles, 2014).

It is essential to monitor and evaluate the emergency and the impact on the community throughout the campaign to determine if the overall response strategy or operations need refinement to address changes to the state of the PHE.
4.1.1 Use Predictive Modeling to Monitor the Emergency

Predictive modeling is a tool that can be used to develop situational awareness of the PHE in its current state and begin to make campaign decisions based on its potential trajectory.

- Establish a modeling structure for the current and projected impacts of the PHE.
  - Modeling may inform campaign components such as community activation and partner opportunities, media options and message development, and how actions taken by the campaign might influence the PHE.
- Identify data analysts with modeling expertise at the outset of the planning process to provide the campaign with findings to support campaign decisions.
- Regularly assess both the actual progression and modeled forecasts of the emergency’s effect on populations.

Models provide a way to examine how changing situations, such as supplying a vaccine in a pandemic, can alter a result (e.g., 100,000 deaths averted), given specific assumptions. By studying current patterns and trends, predictions regarding additional information, like the required administration timeframe and targeted age groups, create the basis of a well-informed plan and anticipated results.

Key Decisions and Activities to Monitor the Emergency and Impact

- Establish an evidence-based modeling program that leverages both actual values and predictive estimates to understand the extent of the emergency and how it changes over time.
  - Incorporate data on the number of cases, fatalities, people requiring treatment or hospitalization, population(s) to target (e.g., for blood or tissue donations, vaccination, or other intervention), and results from the campaign actions (e.g., number of signups to donate or get vaccinated, number of website visits).
  - Model and simulate to help predict where resources should be targeted.
  - Investigate the effectiveness of the campaign to increase awareness, intent, and action.
  - Visualize the key metrics in a dashboard to make the data easier to understand and more widely available to stakeholders.
- Weigh multiple (and sometimes conflicting) factors, including resources to make campaign decisions.

Data Modeling

The Federal COVID-19 Response developed and utilized an evidence-based modeling strategy to track COVID-19 trends based on assumptions made throughout the COVID-19 Convalescent Plasma donor activation campaign. Although the campaign achieved successful outcomes informed by predictive modeling, analyses could have been aided by deliberately tying modeling efforts to decision points earlier in the campaign. This activity would ensure that modeling activities are optimally aligned to the campaign’s data-driven decision-making needs. If predictive modeling is required in future campaigns, teams should encourage early engagement between the modeling team and other essential project team members for outcome traceability.
Depending on the complexity and scope, this may be accomplished with a simple multi-criteria analysis framework or a more advanced optimization.

- **Develop a modeling decision framework.**
  - Define the scope, including regions (e.g., state, metropolitan statistical area [MSA], county) and communities of interest.
  - Define decisions to be made during the campaign.
  - Identify key metrics to support decisions.
  - Identify a methodology to evaluate decisions.

- **Determine whether the campaign team has sufficient expertise** and access to existing modeling resources and capabilities within the organization (e.g., experience in simulation modeling, data analytics, and visualization as well as coding experience in modeling and dashboard tools).
  - Determine any gaps in expertise and supplement staffing with external resources that can be procured early in campaign planning to inform decisions.

- **Conduct, at minimum, weekly analysis** to see changes in models and predictions of how things may change with the emergency.

- **Provide weekly updates** that include predictive modeling results, essential information, and insights to the CMT and the oversight team.

### 4.1.2 Monitor the Evolving Science and Public Sentiment

It is important to monitor the online landscape by using social listening tactics (Conduct and Audience Analysis) and conducting ongoing sentiment analyses of narratives shared across media channels. These activities can help inform communications and address public concerns before they are amplified and before the knowledge gap is filled by misinformation and/or disinformation.

Monitoring evolving science and public sentiment may also help identify credible influencers or opinion shapers who may be approached to serve as trusted messengers for the campaign.

**Key Decisions and Activities to Monitor the Science and Public Sentiment**

- **Develop a regular schedule to monitor social media channels** for relevant topics and how they are manipulated.
  - The schedule will provide situational awareness of current topics and themes in public discourse, the amplification of misinformation and/or disinformation, and public sentiment on the PHE.

- **Monitor published and pre-published medical journals** released with the most up-to-date information on the PHE, including treatment and prevention.

- **Analyze and report social media sentiment** for valuable information to review and revise campaign messaging and strategy.

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**Sentiment Analysis**

Sentiment analysis identifies opinions, attitudes, and feelings expressed in the text of subjective social listening data. It can help determine whether the writer's attitude towards a particular topic is positive, negative, or neutral. Monitoring social media sentiment is critical to gauging an audience and making timely adjustments to the campaign messaging to optimize positive public opinion (Bisio et al., 2017).
Studying shifts and intensity in online conversations may convey the public has a skewed or incomplete understanding about the underlying health issues or how to interpret and apply scientific and clinical guidance. Review how populations translate information and how they discuss it (e.g., assigning positive or negative attributes to currently available information; expressing changed emotional reactions to the PHE, the government, or the clinical community).

- **Establish a regular analysis and reporting schedule** (at minimum weekly) and integrate the schedule into the overall data reporting structure.

- **Share findings with the clinical and scientific advisory body.**
  - Clinicians and scientists can help determine if a mitigation intervention is warranted.
  - Enhanced public education and countermeasures can be devised to promote a scientifically accurate public discourse.

- **Share findings with the communication team.**
  - Potential shifts in the messaging strategy can be identified and implemented.

- **Identify information that may be a potential risk** to the overall response strategy.
- **Identify potential influencers and opinion shapers** that could be partners for community engagement or message amplification.

### 4.2 Monitor and Evaluate the Campaign Strategy and Operations

Monitoring and evaluating the campaign enables the team to measure activity effectiveness and determine if the campaign is on track to achieve its desired outcomes. From the start, it is important that desired outcomes, performance indicators, and metrics are all defined, even if proxy metrics must be used due to data access or measurement issues.

By the campaign’s launch, data sources, data use agreements, and a data collection plan should be developed and ready to implement. These metrics and data must be organized, monitored, and evaluated to determine whether the campaign is on track and whether operations are effective. See the example outcomes and metrics used in the FCR campaign.

#### 4.2.1 Monitor Campaign Milestones

For a campaign to be successful, it is necessary to employ structured management principles with key milestones tracked and progress updates delivered to the oversight team. Milestones are the crucial interim actions or steps that must be achieved reach full campaign implementation. These activities monitor the campaign at the operational level.

Example milestones include:

- Establishment of campaign goals and objectives
- Asset testing and refinement
- Campaign launch
- Initial evaluation, metrics review, and campaign refinement
- Integration of scientific (clinical and research) findings into campaign decision-making
- New campaign outreach based on interim learnings
- Reports on achievements on strategic or operational measures and metrics
- Reports on campaign management process evaluation (Evaluate the Campaign Management Process).
• Reports on campaign outcome evaluation (Evaluate the Campaign Strategic Outcomes)

4.2.2 Monitor Campaign Strategic Measures and Metrics

Campaign leaders must craft and implement well-founded measures and review findings systematically to discover whether the campaign is on track to achieve its desired outcomes. The cadence for measuring and reporting measure status will be driven by the oversight team and by data availability. These activities monitor the campaign at the strategic level.

Key Decisions and Activities to Monitor Strategic Measures

• Follow the monitoring and evaluation framework (Establish the Monitoring and Evaluation Framework).
• Define process and cadence to measure and review strategic metrics.
• Measure strategic metrics and obtain measures.
• Create visualizations and report to oversight team.

4.2.3 Monitor Campaign Operational Measures and Metrics

Separately or in collaboration with the oversight team, the campaign management team (CMT) will develop and use operational measures and metrics regularly to inform whether campaign activities perform efficiently and effectively. These activities monitor the campaign at the operational level.

Key Decisions and Activities to Monitor Operational Measures

• Follow the monitoring and evaluation framework.
• Define process and cadence to measure and review operational metrics.
• Measure and monitor the following operational areas:
  o Communication hub performance
  o Paid organic posts and social media performance
  o All paid media (e.g., paid radio, TV, out of home digital displays)
  o Asset performance
  o Community engagement metrics
• Determine if there is a need for refinement(s) to the campaign strategy or operations (Refine Campaign Operations).
• Follow the data-driven decision framework and log any decisions in the decision tracker.
• Report progress and discuss options with the oversight team, as necessary.

4.2.4 Evaluate the Campaign Strategic Outcomes

Campaign outcomes are used to develop measures to observe campaign community education and behavioral activation effectiveness (Define Desired Outcomes). An outcome evaluation shows the degree to which the campaign is influencing the target population’s behaviors. It tells whether the program is effective in meeting its outcomes and objectives; whereas a process evaluation indicates how the campaign activities contributed to reaching overall program outcomes. The outcome evaluation is only effective after the campaign has contacted the target population and is able to collect enough data over time.

The following are methods for evaluating strategic outcomes (Monitor Campaign Strategic Measures and Metrics):
• Modeling and simulation can be used to compare different strategies’ effectiveness to influence optimal results for people and communities.
• Data analysis, including exploratory and predictive modeling, can be used to investigate the effectiveness of the campaign efforts on the measured outcome.

4.2.5 Evaluate the Campaign Management Process

Campaign management process evaluation measures how well the campaign is working. It includes analyzing metrics for campaign activities and accomplishments by describing measurable outputs (e.g., what was done, how much was done). It also measures whether the campaign is accessible and acceptable to its target population. This type of evaluation provides an early warning for any problems that may occur and allows the CMT to monitor how well the campaign plans and activities are working.

A process evaluation includes data, measures, metrics, and outputs from campaign strategy activities, such as:

- Website metrics and telemetry
- Paid media (e.g., radio, print, television), out of home display, and click-based media (e.g., paid search) metrics
- Social media measures and metrics
- Social listening metrics
- Community partner measures and metrics
- Community activities
- Audience awareness or knowledge
- Assets developed and deployed

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**Evaluating Community Engagement Activities via Website Telemetry**

Community partners amplified campaign messaging and calls to action in a number of ways. On January 27, 2021, the Federal COVID-19 Response (FCR) team partners in the New Orleans, Louisiana MSA sent text messages to 35,000 subscribers to the NOLAReady emergency alert system with links to the The Fight Is In Us website and COVID-19 Convalescent Plasma donation messaging.

Daily (and at times hourly) monitoring of website telemetry revealed a 10x spike in website hits from New Orleans around the time the text alerts were sent. The percentage of website hits that converted into plasma donation center selections was 54% higher than the other 24 MSAs combined. Website telemetry monitoring allowed FCR to measure community awareness and activation and evaluate tactics that produced quality website traffic.

Armed with this evaluation, FCR was able to demonstrate partner impact with current and new community partners to inspire similar action.
5 REFINE the Campaign

This section guides the oversight team and the campaign management team (CMT) to prepare for decisions that keep the campaign focused on accomplishing its goals and objectives by leveraging learnings and information to modify or create mitigation strategies, operations, and tactics using the monitoring and evaluation framework (Establish the Monitoring and Evaluation Framework). The teams will deploy refinements in response to an issue, need, or opportunity.

Like actions on monitoring and evaluation (Monitor and Evaluate), activities that require data-driven refinement are stratified at the campaign’s programmatic, strategic, and operational levels to track progress through the stages of community activation. See Figure 6 below (also represented in Section 2.3).

5.1 Refine the Campaign Based on Situational Changes and Science Updates

Changes to multiple factors may necessitate a shift in campaign strategy or in operational tactics. These include:

- Scientific discovery
- Disease biology (e.g., pathogen resistance)
- Epidemiology (e.g., incidence, prevalence, morbidity, mortality, affected populations)
- Health resource availability (e.g., medicines, medical equipment, medical staff)
- Social factors (e.g., public attitudes and behaviors, including compliance with public health guidance)
- Political or economic factors (e.g., national, state, and local policies; political leadership; budgetary changes)

Following the governance decision model (Prepare), changes are managed through streamlined practices where the CMT is empowered to make agile, tactical adjustments to operational plans.
The CMT should regularly inform the oversight team of general campaign progress and elevate risks or opportunities that may require the oversight team to reallocate resources or reprioritize actions.

As both campaign teams assess objectives within the decision framework, data changes and signals from campaign activities (Respond) can trigger action by the oversight team or escalation and recommendations from the CMT.

Decision makers can support creation of models, dashboards, and visualization tools using multiple sources to populate the tools. These sources can include:

- Website telemetry
- Paid media analytics
- Predictive modeling
- Social listening
- Sentiment analysis
- Audience analysis

The oversight team should review recommendations for meaningful change, and approve, deny, or modify suggested tactical refinements from the CMT. In this way, the campaign can use the decision framework as an active management tool to ensure it continues through the stages of community activation.

**Key Decisions Activities to Implement Campaign Refinements**

- **Obtain and compile** all insights and information.
- **Evaluate** the need for a response using the data-driven decision framework and identify the applicable levers available to refine the campaign.
- **Determine an appropriate response**, for example:
  - Should the scope of the campaign response strategy contract or expand?
  - Should the campaign shift priorities, locations, or audience?
  - Should the paid media or community partners’ strategic operations plans be refined?
  - Should the campaign develop additional risk mitigation strategies?
  - Should the campaign decrease efforts or close due to reduced need?
- **Modify or refine** the response strategy and/or operations informed by data-driven decisions.

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**A Strategic Shift**

The Federal COVID-19 Response (FCR) team successfully executed a significant campaign strategy refinement, driven by the progression of COVID-19 Convalescent Plasma (CCP) science. A high-profile research study determined that CCP intervention caused no harm, but had limited benefit for participants. Based on the ensuing debate surrounding CCP and a subsequent modification to U.S. Food and Drug Administration guidance for its use, FCR modified the community activation strategy.

This campaign strategy refinement led to the development and release of educational content about CCP to thank all participants for their contributions to the campaign – a shift away from a previous campaign objective to activate CCP donors.
5.2 Refine and Develop Counter Messaging to Promote an Accurate and Balanced Narrative

Insights on how people feel regarding the public health emergency or related topics that may impact the campaign can be drawn through sentiment analysis of online data. Depending on the sentiment insights, the oversight team may decide to respond with counter-messaging to insert a more positive, accurate, and/or balanced narrative into the online conversation. This helps ensure the audience of focus holds an accurate scientific understanding of the emergency and the campaign’s desired outcomes.

Not all contradictory conclusions are attempts to disseminate misinformation and/or disinformation. Perspectives, assumptions, experience, and background can all influence the interpretation of scientific research outcomes.

Key Decisions and Activities to Produce Counter Messaging

- Obtain examples of misinformation and disinformation, either online or within the community (e.g., articles, posts, media clips, publications, quotes).
- Assess the current message(s) in the context of online narratives, and obtain insights from trusted experts (e.g., the clinical and scientific advisory group) to ensure scientifically accurate message refinement or counter-message development.
- Leverage the data-driven decision framework to decide whether and how to respond.
- Develop a counter-messaging narrative.
  - Re-align messaging based on stakeholder concerns.
  - Aggregate positive messages into a stronger single narrative.
  - Determine how the counter-message(s) will be disseminated.
  - Consider the audience that will receive the message.
- Determine the message elevation plan to map out how campaign counter-messages will be accessed and engaged with by the audience.
  - Identify or develop creative assets to carry the message(s).
  - Select credible messengers.
  - Determine the platforms and/or channels where the message(s) can be disseminated.
  - Evaluate whether additional efforts or resources may be necessary to address changes in public sentiment affected by the misinformation.
• Refine the campaign messaging strategy and operational plans based on counter-message development and message elevation plans. This may include shifting channel tactics, engaging additional stakeholders, and/or creating new assets. See the example counter messaging plan.

• Review creative assets and edit as necessary for all campaign languages.

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**Balancing the Narrative**

To counter confusion from disinformation about the donation process, the FCR team developed “myth busting” social media content to address the topics directly.

Research studies with vastly differing designs were published and results discussed comparatively in online health provider conversations. FCR created a content series aimed at educating providers about evaluating scientific study design before drawing conclusions.
5.3 Refine Campaign Operations

The CMT’s operational activities will require monitoring and evaluation of key metrics to achieve desired campaign outcomes. Track these metrics weekly for quicker response decisions and to make refinements that ensure tactical and operational effectiveness.

Operational Examples of Data-Driven Refinements

- **Communication hub content**
  - **Refinement:** Redesign website content to be more appealing or engaging.
  - **Source information:** Website metrics and telemetry (e.g., number of webpage hits, length of time on the website, user activity on the website, bounce rate) indicate low audience engagement with specific website content.

- **Paid search tactics**
  - **Refinement:** Execute strategic website changes to improve search engine optimization (SEO) with new keywords, relevant links, and other insights to increase website traffic from search engines.
  - **Source information:** Search results performance, such as search rankings and total number of links pointing to the website, indicate website content could be more prominent in organic search results.

- **Social media tactics**
  - **Refinements:** Shift resources to more effective channels, leverage platform algorithms over manual audience targeting tactics, increase use of top-performing creative assets to optimize campaign reach and recognition.
  - **Source information:** Paid social media metrics such as reach, impressions, engagement, and click-through rate (CTR) indicate campaign content on specific social media channels, and certain assets in particular, lack audience engagement.

- **Earned media tactics**
  - **Refinements:** Shift story pitching forums, shift outlet outreach from national to local (or vice versa), amplify or constrain messaging.
  - **Source information:** Shifts in relevant news cycles, the state of the science, public and professional sentiment, news outlet tone and relevance, and/or spokesperson willingness indicate campaign messaging no longer resonates as intended with earned media channels.

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* A/B Testing: Masks or No Masks?

At the beginning of the campaign, FCR made the decision not to include face masks on characters in the creative assets - the risk of polarizing and alienating parts of the audience was too high. As mask wearing became more normalized across the country, FCR questioned whether masked characters would now resonate and perform better than unmasked. An A/B test on social media showed that when two identical assets were posted - with masked characters and without - the audience had no preference. Based upon this information, no asset refinement was required.
- **Paid media/display tactics**
  - **Refinements**: Adjust the media mix, markets, or budgets (e.g., less frequent rotation of placements, fewer channels, more expedient timeslots).
  - **Source information**: Audience reach, and exposure frequency metrics indicate assets do not perform as desired on existing media channels and/or schedules.

- **Creative asset performance**
  - **Refinements**: Modify digital asset type, design, or production; focus on the type of assets with the best overall performance in a particular channel or medium; retire asset types that fail to amplify or resonate.
  - **Source information**: CTR, impressions, play time and frequency of plays (for radio, video, or motion assets), and/or A/B testing results indicate certain creative materials engage the intended audience better than others.

- **Message design**
  - **Refinements**: Realign messaging type or adjust messengers.
  - **Source information**: Message testing with community stakeholders (e.g., in focus groups) indicates current messages do not resonate with the audience, and/or current messengers are not trusted.

- **Community engagement**
  - **Refinements**: Increase, decrease, or otherwise change partner targets, including number, type, or asks; move resources; or provide additional support to secure partner connections in desired region(s).
  - **Source information**: Engagement data and local ecosystem information (e.g., partner pipeline, gaps in specific regions, partner activities, community engagement team performance against operational goals) indicate that shifts in partner outreach tactics are necessary to achieve the desired impact in target communities.
6 CLOSE and TRANSITION the Campaign

This section guides the oversight team and the campaign management team (CMT) as they shift active campaign efforts to close and transition the campaign toward non-emergency operations or to transition to another entity. It presents how to assess campaign outcomes and impact, share lessons learned, thank the community, transition campaign operations, and prepare final reports.

6.1 Assess Campaign Impact

Impact evaluations determine what effect the campaign had on its intended audience in terms of improved health outcomes. It is counter-factual: "what would have happened if this campaign had not been undertaken?" Unlike campaign monitoring and evaluation, an impact evaluation tends to require more formal processes undertaken over an extended period, allowing time for effects of the public health emergency (PHE) and of the campaign to be observable. Yet it can provide evidence demonstrating the benefits of the campaign and the relative effectiveness of various campaign components, while accounting for potential changes due to extraneous factors (e.g., federal health policies, societal trends, emerging therapeutics) in a more immediate time frame.

The impact evaluation, including the questions assessed and data collected, should be rooted in the goals and objectives set by the oversight team, and pursued by the CMT at campaign onset.

Key Decisions and Activities to Assess Campaign Impact

- **Establish the evaluation framework.** Gather stakeholder input (i.e., from the oversight team, the CMT, the campaign team, federal partners, and community members) obtained throughout the campaign and/or at the outset of evaluation planning, and review the campaign logic model and campaign goals, to determine the evaluation purpose and approach (Centers for Disease Control and Prevention [CDC], 2011).
  - Include the community advisory board and/or members of the audience of focus in the framework development.
  - In the composition of the evaluation framework, consider constraints such as budget, timeline, and external influences to understand the scope, process, and potential mediating factors of the campaign.
  - The evaluation framework should be structured based on the levels of accountability for the overall campaign (e.g., the CMT, the oversight team, participating federal agencies).

- **Develop evaluation questions.** Well-designed questions will focus the evaluation on the information most salient and relevant to the evaluation purpose. Evaluation questions should:
  - Be measurable (i.e., the data required to answer them is available to the evaluation team).
  - Have the possibility for multiple answers.
  - Solve a problem or a need for the oversight team, the CMT, participating federal agencies, and/or the campaign’s community of focus (Issel, 2009).

- **Determine the design.** Depending on evaluation purpose and constraints, determine the most appropriate design.
Like scientific research, evaluation designs can be observational, quasi-experimental, or experimental.

Use pre-test/post-test evaluations as needed to measure change (if leveraging this option, pre-tests should be included in the campaign preparation phase).

- **Identify dependent variables.** In addition to the evaluation questions, defining variables to measure will focus and streamline the evaluation to ensure results are most relevant and useful to all stakeholders.
  - Examples of dependent variables to evaluate in a PHE community activation campaign can include key health outcomes such as lives saved, hospitalizations, emergency department use, length of stay, and disease morbidity; in addition, audience sentiment outcomes such as trust in the government can also be evaluated as dependent variables.

- **Gather data.** Establish a data collection plan to include the timeline, participants, resources, and processes.
  - Determine what type of data will be used (i.e., primary, secondary, or both).
  - Identify data sources, and collection methods (e.g., surveys, focus groups, claims analysis).
  - For primary data collection, set participant recruitment targets and plan for recruitment activities.
  - Be aware of factors that may affect data quality (e.g., instrument design, interviewer bias, data management, routine error).

- **Assess evidence.** Organize, classify, and analyze the data collected.
  - Synthesize findings to draw conclusions around the evaluation questions and tell the evaluation story.

- **Report findings.** Ensure evaluation results are accessible and useful to all relevant stakeholders.
  - Document lessons learned for improvements to future campaign evaluation exercises (CDC, 2011).

### 6.2 Thank the Community

At the core of a community activation campaign are the partnerships (e.g., community partners, public officials) made during the PHE. This collaboration includes aligned missions and values, committed resources, and partner trust. Acknowledging the important contributions stakeholders involved in the mission made in accomplishing the campaign goals is essential.

This recognition lays the foundation for future partnerships with public officials and government agencies. Some relationships may naturally end when the campaign closes. Others, due to their unique insights or community strength, may provide significant value to federal, state, or local agencies and would be beneficial to maintain over time to meet other policy or program goals.
Some creative ways to show appreciation for community partners include:

- **Send a personalized thank you note.**
  - This is a small, low-cost gesture that goes a long way to show appreciation.

- **Recognize partners on print or web materials, and/or on social media.**
  - Explain how and why they were crucial to the success of the campaign.

- **Invite community partners to attend additional trainings, professional development events, or conferences.**
  - Understand that community partners are often vulnerable to the economic impacts of a PHE. Operating budgets may shrink, and staff may be lean. Recognizing stressors in words and actions can strengthen the relationship by bolstering trust.

- **Acknowledge burnout among community-based service providers.**
  - Simply recognizing that burnout is legitimate reflects consideration and understanding of how circumstances place a real toll on partner organizations, their leadership, and staff.

- **Collaborate on manuscript preparation.**
  - Consider that community partners often face challenges in having their findings disseminated, particularly via peer-reviewed academic journals. One meaningful way to thank the partner could be to offer support for manuscript preparation and submission or to co-author content. This could help other communities benefit from the successes and challenges of the partnership.

### 6.3 Review and Share Lessons Learned

Ongoing evaluation and refinement throughout a community activation campaign lifecycle gives the oversight team and the campaign management team (CMT) timely information while the campaign proceeds.
Findings from these lessons-learned evaluations in the close-out phase can be highly informative resources that assist development and implementation of future project operations, strategic planning, goal setting, and tactical decision-making for a reinstated campaign or a public health emergency (PHE). See example lessons learned methodologies and a planning worksheet.

**Lessons Learned Informing this Playbook**

Several recommendations included in this Playbook were derived from a formal lessons-learned evaluation process performed as the Federal COVID-19 Response (FCR) COVID-19 Convalescent Plasma donor activation program closed. One discovery was how the application of real-world evidence was accepted as important and relevant by community members led to higher message impact within communities.

### 6.4 Transition to Recovery and Continuity of Operations

Throughout the campaign lifecycle, multiple types of resources, materials, and collaboration tools will have been created for use in community outreach and message amplification. Decisions regarding those materials — maintenance, additional updates or recoding, storage, retention, public or closed access, and intellectual property rights — are required. See the example checklist for transition.

While some federal guidance may exist for records retention, contracts, grants, or other components, other decisions may require negotiations with community groups; partner coalitions; and/or federal, state, and local partners to determine responsibilities. If these decisions were not included in any formal agreements made by government agencies with external partners or with the operators of a campaign management team (CMT), developing continuity of operations plans will facilitate the campaign close-out and any planned public reporting.

Transferring all assets to the oversight team or its government designee, and documenting processes followed in the transferal support government archival efforts. It can facilitate revival of the campaign framework and partner relationships in the future, should circumstances require additional community activation to address the PHE. Additionally, all records and information not publicly available that were produced during the campaign must be retained in case a request to obtain those records is submitted under the Freedom of Information Act (1967) (FOIA request).

**Key Decisions and Activities to Transition the Campaign**

- Inventory and coordinate the transfer of all assets. Stakeholders in a large project often share assets, both internally and externally. Maintaining access to these assets for continuity of operations is vital to successful project completion.
Scheduling and oversight of asset transfer will ensure a seamless transition from CMT daily operations to the oversight team’s close-out.

Example assets include, but are not limited to:

- Digital content
- Website artifacts
- Software repositories
- Collaboration tools
- Social media accounts
- Audio and video files

- Identify and document procedures the campaign established for required activities such as content creation, issue reporting, task generation, requirements gathering, and reporting.
- Conduct interviews before stakeholders leave the campaign to transfer implicit knowledge of processes and procedures and determine whether to continue those activities through the end of the effort.

### 6.5 Prepare Final Reports

The oversight team may decide or be asked to release documentation of how community activation efforts influenced the public sentiment and changed behavior, resulting in a reduced impact of the public health emergency (PHE) on communities.

Data tracked in the project dashboards, testimonies from individuals or community leaders, and specific goals and outcomes outlined during the strategic preparations all serve as resources to construct reports that can address different stakeholders’ interests in the campaign’s processes and outcomes. It may be important to explain how or whether certain campaign resources will remain available for review and use, particularly if the PHE is not fully abated or the health risks remain at a lower level of intensity or impact.