OHB Communications Guidelines*
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Guides

Tools and Tip Sheets

* This document contains excerpts from *OHB Communications Guidelines* (70 pp.) developed by the Occupational Health Branch, California Department of Public Health, which were developed internally and not as a publicly available document. This is being shared with the CSTE Occupational Health Subcommittee as a handout for a presentation at the June 2016 CSTE annual conference by Barbara Materna. Please do not share or quote.

Starting and Planning a Communications Project

Project Description (5 words or less): Program:

Contact name(s): Date:

Health issue addressed: Fillable Version

Starting a Communications Project

Note: Answering the questions below will help us decide whether it makes sense to undertake a project. Keep answers brief. It's OK if we can't answer everything, especially at the start. We can return to questions as we move forward and learn more.

1. Why are we considering starting this communications project?

Things to consider:

a. Significance of problem:

- ✓ Which industries are affected?
- ✓ Approximately how many workers and workplaces are affected?
- ✓ How severe is the potential injury or illness?
- ✓ Are the affected workers part of an underserved population? If yes, describe.
- ✓ What will the Branch or its staff gain from it?
- ✓ What other info do we need to understand the problem?

b. Identified gaps:

- ✓ What other groups are addressing this issue, and what are they doing?
- ✓ What needs to be done that's not being done by others?

c. Timing:

- ✓ Is there an event, activity, or something else that makes this a good time to start this project?

d. Impact:

- ✓ What are the most important changes we could help make?
- ✓ Who has the ability to make these changes?
- ✓ How can we motivate those who have the ability to make changes?
- ✓ Given this, who should our audience be?

Planning a Communications Project

Note: Answering the questions below will help us effectively plan our communications project. Keep answers brief. It's OK if we can't answer everything, especially at the start. We can return to questions as we move forward and learn more.

1. What specific action(s) are we asking our audience(s) to take?

2. What do we know about our audience(s)? (e.g., levels of knowledge about topic, current workplace conditions, literacy skills, language, race/ethnicity, beliefs, values, behaviors). What else do we need to know?

3. Where and how does our audience(s) get information?

4. Dissemination: What product(s) will we create and how will we get it to the audience(s)?

Audience	Product	Dissemination method

5. What stakeholders (including audience) will we work with to develop, disseminate, and evaluate this effort? How will we involve them?

6. How will we evaluate this effort?

7. What resources (personnel and funds) do we need?
   - ✓ How long is this effort likely to take?
   - ✓ Don't forget production, translation, field-testing, dissemination, and evaluation.
   - ✓ Specify any resources needed outside the section (e.g., web posting, e-OHW)

See the *Product Development, Dissemination, and Evaluation Guides* for detailed guidance.

Communications Product Dissemination Guide

This guide will help you develop and carry out an effective dissemination plan for your communications product. It leads you through a process of 1) identifying who needs to get your product, 2) choosing the best methods to reach them, and 3) creating a dissemination plan.

Guiding Principles

- **Your dissemination plan is as important as your product**. No matter how strong your communications product, it's worthless if you don't get it into the hands of your intended audience.
- **Start early – make dissemination part of your project plan from the beginning**. If you leave dissemination planning to the end, you may miss opportunities for collaboration and for actively engaging the people you wish to disseminate your product to.
- **Your dissemination plan flows from your analysis of the audience for your product**. Understanding your product audience will help you identify potential contact persons/points for your audience where materials can be disseminated effectively.
- **Use a multi-pronged approach to maximize success**. For example, other individuals or organizations may be able to distribute your product for you, or may use your product with the target audience (*see the diagram on Outreach Targets below*). Explore which dissemination methods are likely to be most effective with your outreach targets.
- **Think about how your effort will benefit the outreach target**. Successful dissemination strategies deliver what the recipient both wants and needs. For example, since trade associations are often looking for newsletter content, providing them with a short article about your product can meet their needs as well as disseminate your product.
- **Avoid duplication of effort – whenever possible partner or piggyback**. This will maximize your resources and avoid overwhelming your outreach targets with a lot of overlapping efforts (e.g., multiple mailings, events, emails).
- **Quality over quantity**. Getting your product to those who will really use it is more important than distributing a lot of copies without knowing whether they are being used to help the product's audience.

Communications Product Dissemination Guide

Steps to Developing Your Dissemination Plan

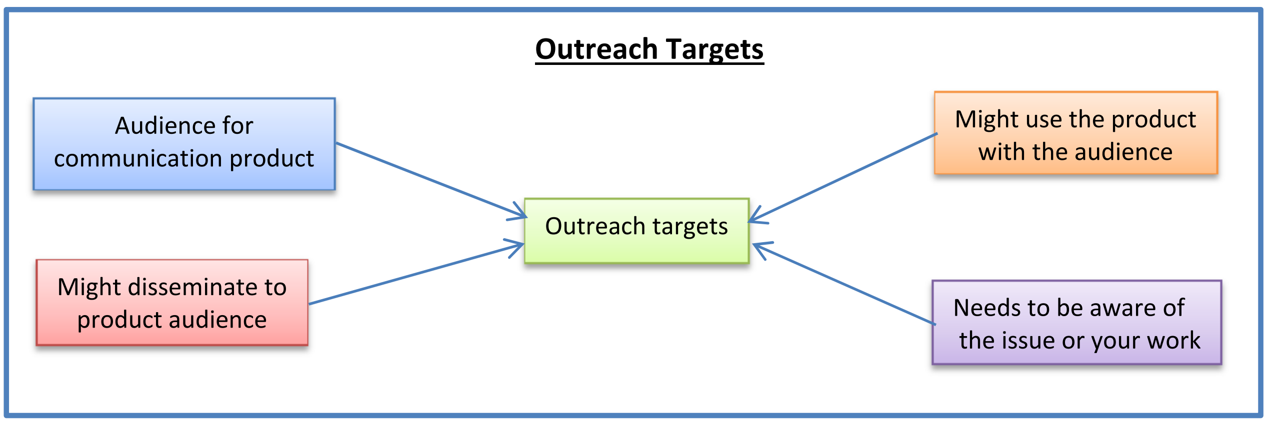
Identifying who needs to get your product (these are your "outreach targets")

Step 1: Brainstorm potential outreach targets.

Remember, your outreach targets will likely be broader than your product's target audience.

Things to consider:

- ✓ Will you disseminate directly to the target audience for your product?
- ✓ Who might disseminate the product to the target audience for you?
- ✓ Who has access to, and is trusted by, the product's target audience?
- ✓ Are there others doing similar work in this area with the same audience?
- ✓ Who might use the product with your audience?
- ✓ Who needs to simply be aware of the issue, your work, or your product?



Step 2: Identify the purpose of communicating with each outreach target.

Do you want your outreach target to:

- ✓ Read or watch the product (product target audience)?
- ✓ Share with others such as coworkers, family members?
- ✓ Disseminate to the product target audience for you?
- ✓ Use it with product target audience, e.g., train with it?
- ✓ Become aware of the issue or your work as a result of viewing the product?

Evaluation Made Easy

A note from your friendly OHB Health Educators…

How can we know if our communication efforts or products had the effect we intended? If we don't evaluate what we do, we'll never know who we reached, if our message got across, and whether it was worth the effort and resources.

We know that ***evaluation*** can be intimidating, especially if you haven't done it before. We've created "Evaluation Made Easy" just for you. You don't have to spend months or hire a consultant to evaluate your communication effort. This guide provides step-by-step tips and adaptable templates to make evaluation easy. Once you know the basics about your project (audience, what you want them to do, dissemination plan, etc.), it will take you very little time to create an evaluation plan that works for you.

Contents

See also ***Evaluation Tips, Templates, and Samples*** later in the Guidelines.

Evaluating Your Dissemination Efforts

Dissemination Evaluation Question: Did your product reach the outreach targets (OT)?

Step 1 Develop a list of all your outreach targets and corresponding dissemination methods

Step 2 For each dissemination method, choose one or more evaluation methods from the table below.

Possible Methods for Evaluating Dissemination Efforts

*See additional detailed information on using **WebTrends**, **MailChimp**, and **bitly URLs** in the appendix,* *Evaluation Tips, Templates, and Samples,* later in the guide.

Common dissemination methods and ways to evaluate them
Physical mailing
• # returned/# mailed (Note: requires 1st class mail, "*return request*")
Email
• MailChimp (counts # opened emails, clicks on links in email, bounce-backs)
• WebTrends (counts # visits, unique visitors, downloads of product, etc.)
• Create *bitly* URLs and track visits to them
Listserv
• check to make sure sent to listserv
• WebTrends (counts # visits, unique visitors, downloads of product, etc.)
• Create *bitly* URLs and track visits to them
e-OHW
• MailChimp (counts # opened emails, clicks on links in email, bounce-backs)
• WebTrends (counts # visits, unique visitors, downloads of product, etc.)
• Create *bitly* URLs and track visits to them
Other newsletters
• check posting in newsletter (contact directly, check website, get on newsletter mailing list)
• WebTrends (counts # visits, unique visitors, downloads of product, etc.)
• Create *bitly* URLs and track visits to them
Website
• WebTrends (counts # visits, unique visitors, downloads of product, etc.)
Social media (use key collaborators who have blogs, Facebook, Twitter, LinkedIn)
• check to see if those you asked to post/announce/link to your piece did
• Webtrends (counts # visits, unique visitors, downloads of product, etc.)
• Create *bitly* URLs and track visits to them

More dissemination methods and evaluation possibilities
Presentations/Workshops
• attendance count
• identify who's in audience o sign-up sheet which collects info on who attendees are o ice breaker that helps identify who's in audience o ask audience simple questions and do hand count o ask convener what information they can provide on who attended
• written post-presentation evaluation survey
Tabling at conference
• get info from convener on who is attending
• count materials handed out
• ask visitors for business cards
• talk to visitors and jot down your impressions
One-on-one contact
• keep track of who you contacted (how many? who?)
• ask about intent to use piece
Press
• did OPA issue a press release? if not, why not?

Step 3: Develop a plan with activities, due dates, and person responsible.

✓ Consider using a table like the one below to help you develop your plan.

OT	Dissemination method	Evaluation method	Timing	Who's responsible	Staff time needed	Date done

Evaluating Your Communication Product

Product evaluation questions

Outreach Targets (OT)

- Did your outreach target read, watch, share, or use your product after receiving it?
- Do they think the product will be effective with the target audience?
- Do they have any suggestions for improving the product?

Target Audience (TA)

- Did your target audience read, watch, share, etc. your product after receiving it?
- Did they get your core messages?
- Do they plan to do anything based on the information in your product?
- Do they have any suggestions for improving the product?

Step 1 Remind yourself of who your outreach targets and product audience are, what your core messages are, and what you're asking them to do.

Step 2 Review the potential product evaluation methods below and choose the method that you think is feasible given your time and resources. You may choose to do both.

Possible Product Evaluation Methods

- Brief phone survey (10-15 minutes) with 6-12 individuals among your outreach targets and/or target audience. See *telephone survey tips* and *sample questions* for each group.
- Brief electronic (online) survey using the OHB Survey Monkey account. See *tips for doing an online survey* for help setting up a survey as well as sample surveys.

See additional detailed information on using phone surveys and electronic surveys in *Evaluation Tips, Templates, and Samples*, later in the guide.

Step 3 Develop your evaluation plan with activities, due dates, and person responsible.
- ✓ Consider using a table like the one below to help you develop your plan.

OT/TA	Evaluation method	Timing	Who's responsible	Staff time needed	Date done

Evaluation Tips, Templates, and Samples

- **Using WebTrends**
  - ✓ Tips for using WebTrends to Evaluate Dissemination of Web-Based Content
  - ✓ WebTrends Request Form
- **Using MailChimp**
  - ✓ Tips for Using MailChimp to Send and Evaluate Email Blasts
  - ✓ Track your email blast performance - sample report
- **Creating unique URLS** and tracking visits to them
- **Doing a phone survey**
  - ✓ Tips for Doing an Outreach Target Phone Survey
  - ✓ Tips for Doing a Product Audience Phone Survey
  - ✓ Sample questions for outreach targets
  - ✓ Sample questions for product audience
- **Doing an electronic survey** with Survey Monkey
  - ✓ Tips for Doing an Online Survey
  - ✓ Using the Survey Monkey website
  - ✓ Sample questions for direct dissemination
  - ✓ Sample questions for indirect dissemination (embedded survey link)

Tips for Using MailChimp to Send and Evaluate Email Blasts

MailChimp is a fairly easy program for sending email blasts that tracks who opened and clicked on links in your email. It will help you answer the evaluation questions "Did my audience receive the product," (the email), and "Did they read, view or share the product with others?"

These tips will help you create and send email blasts through MailChimp and do some basic evaluation of your dissemination and audience response.

Faith and trained OHB staff can help with email blasts using MailChimp; other staff can get trained in using MailChimp if they want to create their own email blasts. Staff who have been trained will be given the log-in and password info to use OHB's Occupational Health Watch account (www.mailchimp.com). Ask Faith if you would like to be trained on MailChimp. You can also ask Faith to send an email blast for you if you are an infrequent user and it is easier.

What are the advantages of using MailChimp for an email blast?

1. You can create an email format or "template" that looks professional and can be saved and reused.
2. You can easily import email addresses from OHB's Contacts Database into MailChimp.
3. MailChimp automatically gathers information on email "bounces" that allows you to easily update the Contacts Database.
4. MailChimp generates a report you can use to evaluate your email blast.

What do I need to do / have ready in advance to create an email blast in MailChimp?

To create an email blast—called a "**campaign**" in MailChimp—there are a few things you'll need to do in advance. These include:

- Choosing an existing **mailing list** or creating your own.
- Choosing an **email template**.
- Deciding the **date** you want your email blast (campaign) to go out.
- Checking with Branch Chief /Barbara Materna about what level of approval is needed.

How do I evaluate my email blast in MailChimp?

After sending your email blast, MailChimp begins compiling a report. This report can help you evaluate your dissemination and the quality of your mailing list by telling you how many of the people you sent the email actually received it. It can also help you evaluate the email blast itself by providing you information on the audience response to it.

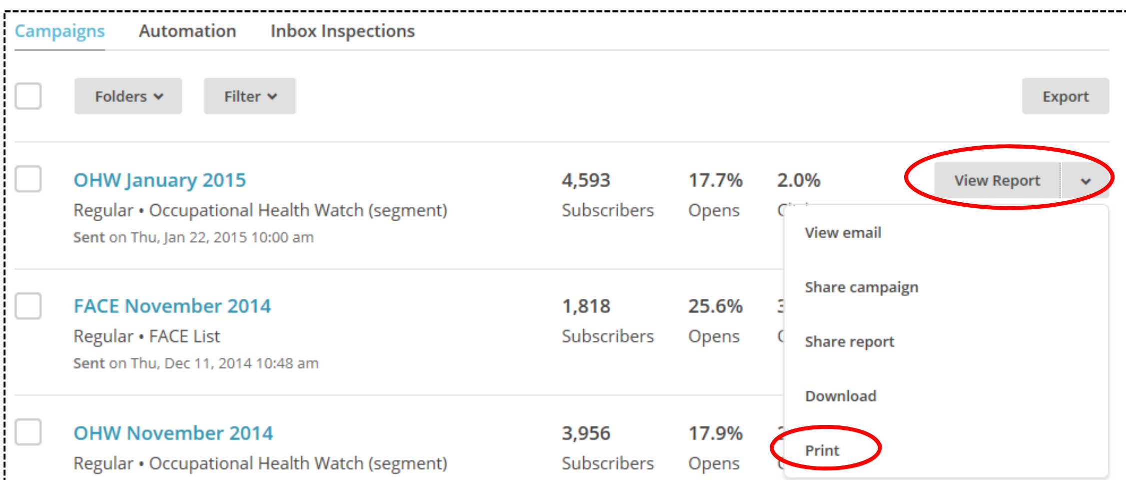
You can see the report very soon (within hours) after your email blast is sent! MailChimp automatically updates the report as recipients open the email. The report should be close to final in a few days. Be sure to check your report within 30 days of your email blast, as some of the more detailed information is only available for a month.

To understand and use the report you need to know the terminology MailChimp uses to describe things. Here's a quick cheat sheet; more information is available on MailChimp website:

- **Recipients** - number of email addresses blast was sent to
- **Successful deliveries** - number of recipients that didn't "bounce" back
- **Opened** - number of unique individuals who opened the e-mail or clicked on a link in a "preview pane"
- **Open rate** – percent of people who received the e-mail that opened it
- **Clicked** – number of (unique) recipients that clicked on any tracked link in the e-mail
- **Clicks per unique opens** – percent of people who opened your e-mail that also clicked a link
- **Click rate** – percent of successfully delivered emails that registered a click.
- **Forwarded** – number of times the e-mail was forwarded using the *Forward to a Friend Link. (Note this does not count people who forwarded it via their e-mail)*
- **Bounce** – when an email is rejected by a subscriber's email server. *(Note: this can occur for a number of reasons, including bad addresses, server thinks your e-mail is spam, etc.)*

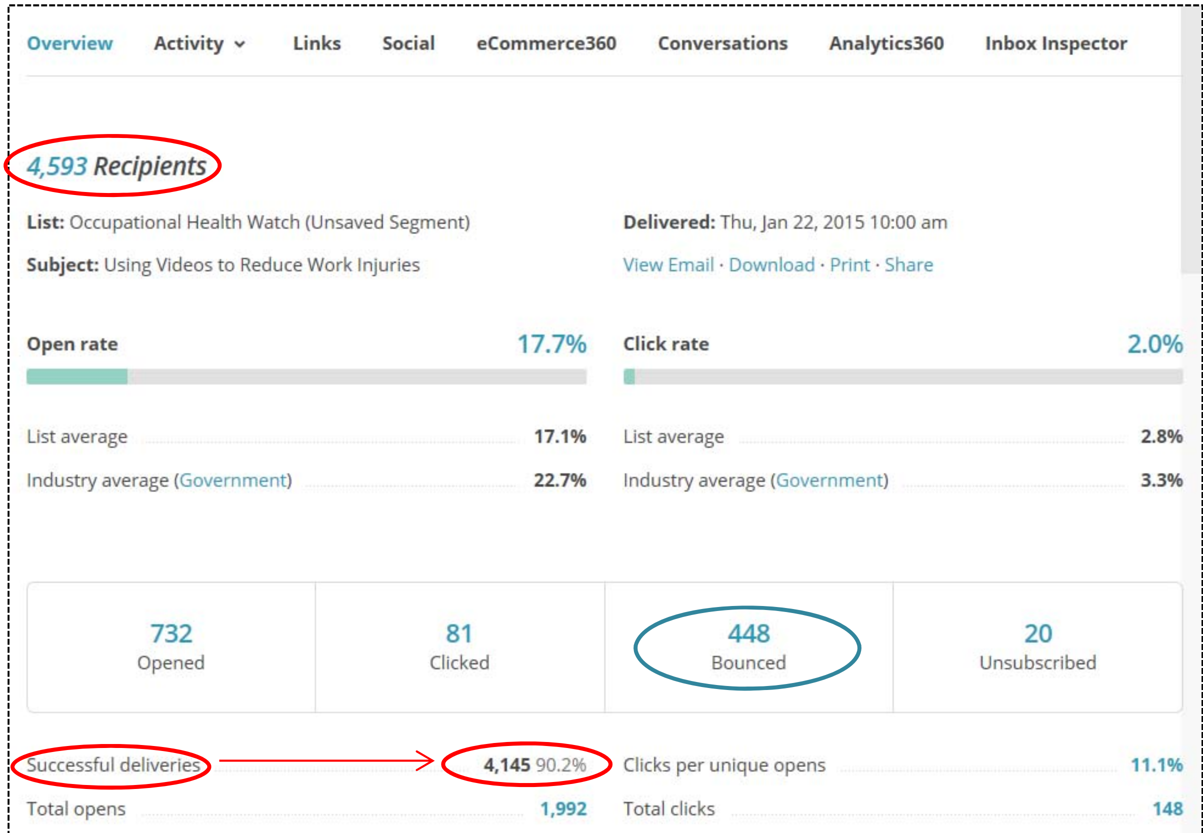
To see the MailChimp report

1. Log onto the MailChimp site and click "Reports".
2. Click the "View Report" link to the right of your campaign. You can also email, download, or print the report.



Did my email reach my audience?

1. The "Overview" section of Reports shows you how many people you sent the e-mail to (Recipients), and the number and percent of those that were successfully delivered.
2. It will also tell you how many e-mails bounced. You can click on the number above "Bounced" to find out which e-mails bounced and why.



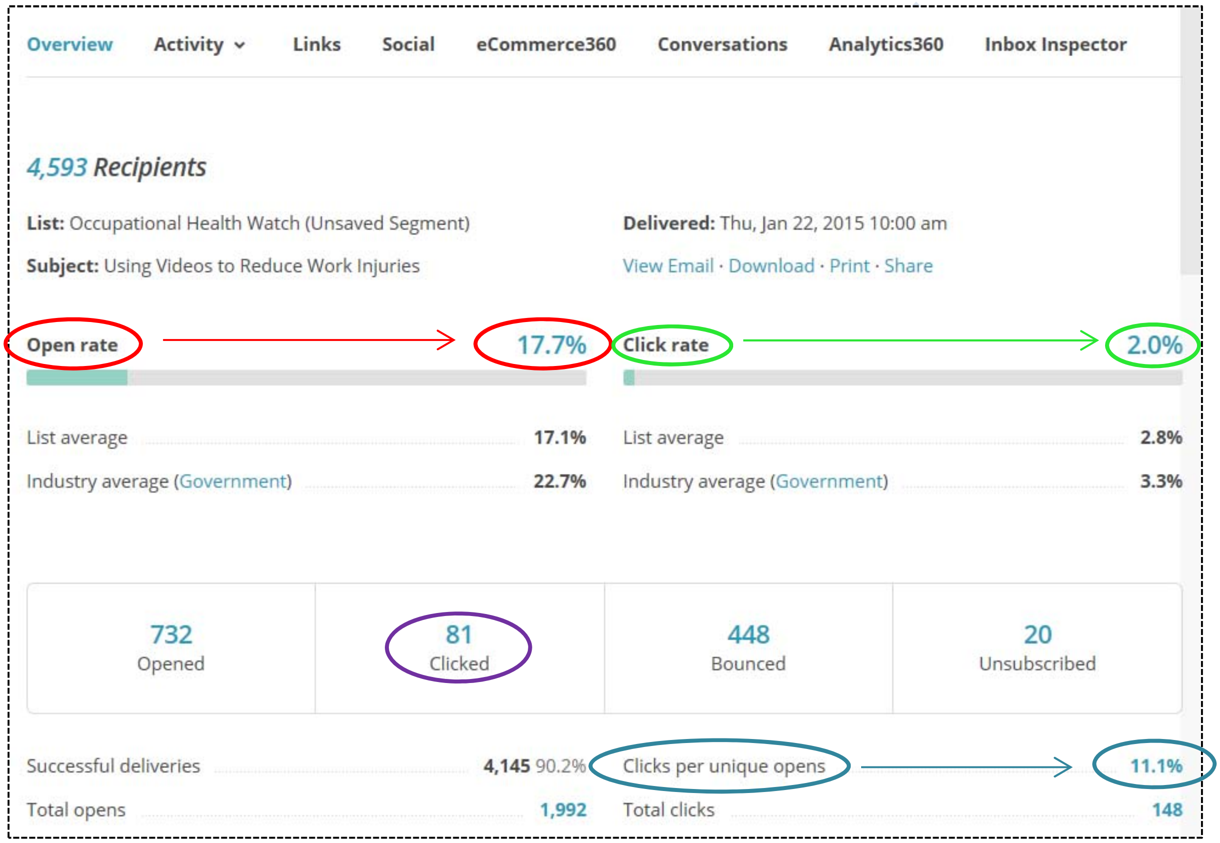
What was my audience's response to the e-mail blast?

You can look at whether the subject line was effective and whether the subject was of enough interest to your audience for them to open the e-mail. For those who opened the e-mail, was the content compelling enough that they clicked one or more links in the e-mail? Looking at which links in your email were clicked on most often can also inform you about what generated interest in the email.

1. The “Click rate” tells you the percent of **people who received your email** that clicked on a link in it to access your communication product (e.g., factsheet, video, etc.). This is the true measure of how many people actually got the information or product your email blast was promoting.
2. The "Open rate" tells you the percent of people who received your e-mail that opened it.

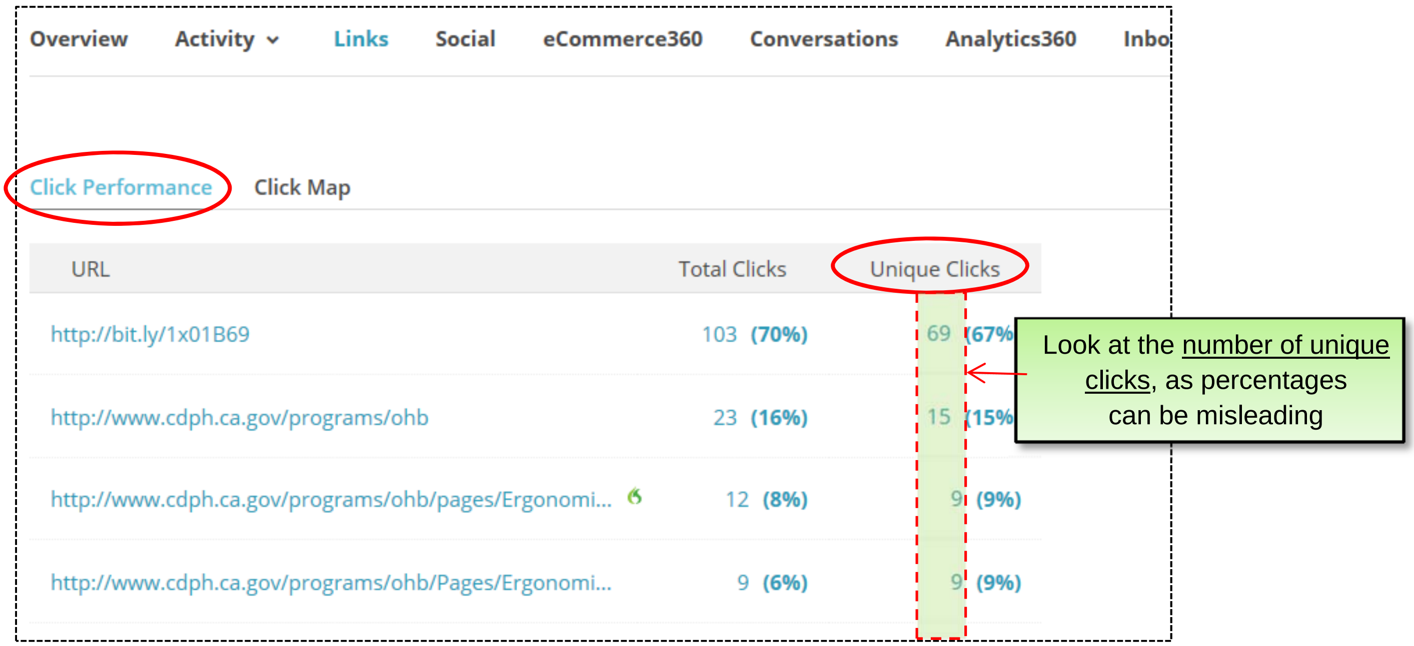
3. The “Clicked” number tells you how many **unique recipients** clicked on one or more link(s) in your e-mail. "Clicks per unique opens" tells you the percentage of people who opened your e-mail that clicked on one or more links.

4. To see which links (URLs) were clicked on most often or compare the "popularity" of your links, click on "Clicks per unique opens" from the “Overview” screen, or choose “Links” from the report menu at the top.



5. This will take you to the “Click performance" screen.

✓ "Unique clicks" indicates how many unique individuals clicked on the link. Comparing this number to the total recipients you sent the blast to gives you important information on your success in reaching and engaging them.



6. Other things you can find out about the response to your email include:
   - ✓ How many recipients forwarded it (using the "forward to a friend" link).
   - ✓ How many unsubscribed.
   - ✓ How many reported abuse.
   - ✓ For each of these you can click on the number to see the email addresses of recipients who took that action.

Note: You can click on many of the numbers described above to see the email addresses of individuals who performed the actions (opening, clicking on links, etc.).

The handy "***Track your email blast performance***" form on the next page will help you extract and review the most important information from the MailChimp report for evaluating your email blast.

What about evaluating how many people we reach when other groups include an OHB blurb or promote our materials in their e-newsletters, web pages or blogs?
OHB often sends a blurb about our email blasts to different listservs and collaborators to post on their websites. We use a "*bitly.com*" link to shorten the URL/link to the web pages or materials we are promoting (including the online version of our MailChimp newsletter). Bitly.com will tell you how many people clicked each *bitly* link. For more information, see *Creating unique URLs and tracking visits to them.*

Track your email blast performance

For a quick snapshot of your email blast's key performance numbers, print this page and fill in the numbers from your MailChimp report.

Campaign / email blast name: ____

Date sent: ____________________ Staff Contact: ____________________________

Value	Number	Percent
Number sent ("recipients")		NA
Successfully delivered emails (% of emails that did not bounce)		
Opened (*Open rate:* % of successfully delivered emails that were opened)		
Clicked - number of individuals who clicked on at least one link (*Clicks per unique opens*: % of individuals that opened the email who clicked on a link)		
Click rate (% of successfully delivered emails that registered a click)	=====	
Most popular links Number of unique clicks (% of total unique clicks)		
Link name/ URL		

Creating unique URLs and tracking visits to them

How can we evaluate the number of people we reach when other groups include an OHB article or blurb in their social media and outreach?

OHB often sends a blurb about our email blasts or outreach efforts to different listservs and collaborators to post on their websites or include in their listservs, newsletters, blogs, or other social media. We provide links to our online materials, including web pages, publications, and online versions of our newsletters.

"*Bitly.com*" allows you to create a shorter URL/link to the web versions of each page or material you are promoting. You can create a unique *bitly* link for the same product that is promoted at different times, by different partners, to different target audience segments, or through different venues. *Bitly.com* will tell you how many people clicked each *bitly* link. This allows you to track the activity generated by different electronic dissemination efforts. This service is free; you just have to sign up on the website.

You can also customize your links by giving them a name that you choose. This requires that you have a paid *Bitly.com* account. (*Note: We are researching prices for paid accounts*.)

Many other groups offer this service, including:

- *tinyurl.com/*
- Google URL shortener - *https://goo.gl/*
- *tiny.cc/*
- *ow.ly/*
- All links (URLs) posted in Tweets are shortened using their *t.co service*

(*Note: We are researching prices and web metrics functionality for these groups*.)

Tips for Doing an Outreach Target Telephone Survey

These tips will help you plan and conduct your outreach target phone survey, as well as make use of the survey results.

Why should I survey my outreach targets?

The OT phone survey will help you assess the success of your dissemination plan as well as provide useful information on your product. Because you selected outreach targets that know your product audience well and have access to them, it makes sense to get their feedback on your final product. In addition, you likely already have easy access to your outreach targets.

Who should I survey?

Look at your list of outreach targets and prioritize the list by who is most knowledgeable about your product audience and who you can easily contact (i.e., you have, or can easily get, phone numbers). Set a goal of interviewing 6 – 12 members of your outreach target groups. The exact number will depend on the number in your starting list and who you can reach.

When should I conduct the survey?

You should consider doing your phone surveys about a month after you send your product to the outreach target. This will give them enough time to have looked at what you sent and taken action on it, but not so long that the product will not be fresh in their minds. Also, once you start, try to complete all your survey calls within one to two weeks.

How do I use the phone survey template?

Download the *Outreach Target phone survey template* and adapt the template for your product/project. Have handy your product's core messages, and the action you asked the outreach target to take, before you try to adapt the survey.

How do I conduct the survey?

Consider these steps for conducting the survey

- ✓ Technical staff familiar with your project or its content should conduct the survey; ideally, the person(s) who developed the piece would not conduct the interviews.
- ✓ Choose call times that are likely to be convenient for your target.
- ✓ Familiarize yourself with the survey questions beforehand.
- ✓ When you do your survey interview, listen carefully, take your time, ask for clarification of answers if needed, and take careful notes.
- ✓ Right after the interview, review your notes and fill in any gaps/shorthand.

What do I do with the survey results?

- Questions 1, 2 & 3 – tally up the responses (yes/no/plan to)
- Question 4 – look at how responses compare to the core messages you identified
- Questions 5 & 6 – group the responses for each question, identify recurring themes/responses, note outlying responses
- Look at the data above and discuss the implications of your results in light of these questions:
  - ✓ Does it seem like your effort was worth it?
  - ✓ Is there anything you could/would/should do differently next time?
  - ✓ Do the responses suggest changes to your product that you want to consider?
  - ✓ Do the responses suggest changes that could/should be made to your dissemination plan, including your choice of outreach targets?
- Look at the OT survey results in conjunction with any data/feedback you may collect from product audience surveys or other evaluation efforts

Tips for Doing a Product Audience Phone Survey

These tips will help you plan and conduct a phone survey of your product audience, as well as make use of the survey results.

Why should I survey my product audience?

A phone survey of your product audience will provide useful information on your product directly from those who use it. They will give you the best feedback on whether your product is effective.

How do I identify and reach members of the product audience to survey?

If you disseminated your product directly to the product audience, go back to your dissemination list to identify individuals to survey. If you do not already have phone numbers for individuals from the source of your list, you can often find phone numbers for employers, health care providers, and health and safety professionals on the web. If your product audience is workers, getting phone numbers can be much harder. OLPPP can use the blood lead Registry to find worker phone numbers; other sections might be able to find worker phone numbers from prior case investigations. Community and worker advocacy groups, for example day labor groups and unions, may also be able to put you in contact with workers. Trainings and other events are also places you can enlist worker participation in a phone survey.

If you disseminated your product to workers through an Outreach Target (OT), contact the OT to see whether they can provide you with contact information (phone #s, email addresses) for members of your product audience. If they can give you email addresses but not phone numbers, use Survey Monkey for this audience instead (see *Tips for Doing an Online Survey*).

If your product had more than one audience, identify a few individuals from each audience to survey. Set a goal of interviewing 6 – 12 members of your product audience(s). The exact number will depend on the number in your starting list and who you can reach.

When should I conduct the survey?

You should consider doing your phone surveys a couple of weeks after you send your product to the product audience or your product is disseminated to the audience by others. This will give them enough time to have looked at what you sent and digested it, but not so long that the product will not be fresh in their minds. Also, once you start, try to complete all your survey calls within one to two weeks.

How do I use the phone survey template?

Download the *Product Audience phone survey template* and adapt the template for your product/project. Have handy your product's core messages, and the action you asked the product audience to take, before you try to adapt the survey.

How do I conduct the survey?

Consider these steps for conducting the survey

- ✓ Technical staff familiar with your project or its content should conduct the survey; ideally, the person(s) who developed the piece would not conduct the interviews.
- ✓ Choose call times that are likely to be convenient for your product audience.
- ✓ Familiarize yourself with the survey questions beforehand.
- ✓ When you do your survey interview, listen carefully, take your time, ask for clarification of answers if needed, and take careful notes.
- ✓ Right after the interview, review your notes and fill in any gaps/shorthand.

What do I do with the survey results?

- Question 1 & 2 – tally up the responses (yes/no)
- Question 3 – look at how responses compare to the core messages you identified
- Question 4 – group the responses, identify recurring themes/responses, note outlying responses; compare responses to the desired actions you identified in your product
- Question 5 – group the responses, identify recurring themes/responses, note outlying responses
- Look at the data above and discuss the implications of your results in light of these questions:
  - ✓ Does it seem like your effort was worth it?
  - ✓ Is there anything you could/would/should do differently next time?
  - ✓ Do the responses suggest changes to your product that you want to consider?
- Look at the product audience survey results in conjunction with any data/feedback you may collect from outreach target surveys or other evaluation efforts

Sample Phone Survey Questions

Sample phone survey questions – Outreach Targets

Introduction

Hello, my name is [interviewer name]; I work in the California Department of Public Health. I'm calling to follow up on the [*factsheet/video/other*] we sent to you a few weeks ago. We are interested in seeing if what we sent was helpful. Would you be willing to answer a few quick questions? It should only take 10 minutes.

1. Did you receive the [*product name*]? *[If "no", say thanks and goodbye.*]

2. Did you look at it? [*If "no", say thanks and goodbye.*]

3. Did you [*do what we wanted you to do*] with the [*product*]?*
   **Fill in the action(s) you wanted this outreach target to take with your product, i.e., distribute it to their employees, train employees with it, share with others in industry, etc.*

4. What do you think the most important points of the [*product*] were?

5. Effectiveness questions
   - Do you think [*product audience*] are likely to read/watch this? Why or why not?
   - How easy would this be for [*product audience*] to understand?
     Probe: If not easy, why? What about it is difficult, etc.
   - How likely is it that this would motivate [*product audience*] to [*action(s) you wanted product audience to do*]?*

   **Use the (one or two) actions you wanted the product audience to do to tailor these questions.*

6. How could we improve the [*product*] to make it more effective?
   Prompts: for example, provide less information; provide more information or more detail; make it easier to read; use photos or images more effectively.

Sample phone survey questions – Product Audience

Introduction
Hello, my name is [interviewer name]; I work in the California Department of Public Health. I'm calling to follow up on the [*factsheet/video/other*] we sent to you a couple of weeks ago.* We are interested in seeing if what we sent was helpful. Would you be willing to answer a few quick questions? It should only take 10 minutes.

1. Did you receive the [*product name*]? [If "no", say thanks and goodbye.]

2. Did you look at it? [If "no", say thanks and goodbye.]

3. What do you think the most important points of the [*product*] were?

4. What might you do as a result of reading/viewing our [*product*]?
   Probe on desired actions if not all mentioned, e.g., How likely are you to [*do desired action*]?**
   ***Fill in the (one or two) actions you wanted the product audience to do to tailor these questions.*

5. How could we improve the [*product*] to make it more effective?
   Prompts: for example, could we provide less information; provide more information or more detail; make it easier to read; use photos or images more effectively.

* *If someone else disseminated your product for you or sent out links to your product, modify the Introduction and Questions 1 &2 as needed.*

Tips for Doing an Online Survey

An online survey is a good way to evaluate communications products that are disseminated **electronically** (email, websites, etc.). These tips will help you use Survey Monkey to evaluate your product, as well as make use of the survey results. In some cases it can also provide you with information as to whether your product reached your audience.

What are the advantages of using an online survey?

Online surveys are quick and easy for participants to use; they have become quite common, so people who use the Internet are familiar with them. If you disseminated a communications product to people electronically, for example, an email blast, you can access them the same way to ask them to do the survey. Sending out an online survey is less labor-intensive than doing telephone surveys and it's a great alternative when you can't easily get phone numbers. In addition to convenience, using online surveys may enhance participation in your evaluation. They can be experienced as less "personal" or "intrusive" than an in-person contact or phone survey, especially if they are set up to be completed anonymously.

How will I get my online survey to my outreach targets and product audience(s)?

How you get your survey into people's hands will depend on how you disseminated your product. If you disseminated it directly to individuals electronically, for example, an email blast, you can use the same method to send a link to your survey. Often you will disseminate through others or post your product on the web for people to go there on their own ("indirect dissemination"). Some examples of "indirect dissemination" include listservs, online newsletters, collaborators' blogs, etc. For these, you can embed a link to your survey in your communications product or web page so anyone who reads or views it is encouraged to provide feedback.

Which Survey Monkey Template should I use?

DIRECT survey template	*INDIRECT ("embedded") survey template*
Use when the product <u>and</u> the survey link are disseminated directly to individuals by OHB. *Examples*: • OHB sends an email blast to employers in X industry with a link to our latest fact sheet • OHB sends out a link to our latest topic page to a listserv we are members of and later surveys the listserv members	Use when the survey is embedded in the communications product or on a web page. *Examples*: • Outreach target sends out a link to our web page • Partner puts a link to our product on their blog • OHB posts our product on the web • OHB sends an eOHW with a link to our product

When should I create my survey?

Since one of your dissemination methods will likely be posting your communications product on the Internet, it makes sense to create your online survey while you are developing your product. That way you can embed the survey link before you finalize your product. The 2 to 3 core messages and the actions you want your audience(s) to take should be available at the outset of developing your communications project; that is what you will rely on to create your survey.

When should I send out the online survey?

For products you disseminated directly, you should consider sending out your online survey 2-4 weeks after you send your product to the outreach targets and product audience(s). This will give them enough time to have looked at and digested what you sent and taken action on it, but not so long that the product will not be fresh in their minds. If you are embedding a survey link in your product or on a web page, be sure to add the live survey link before you publish or post them on the web.

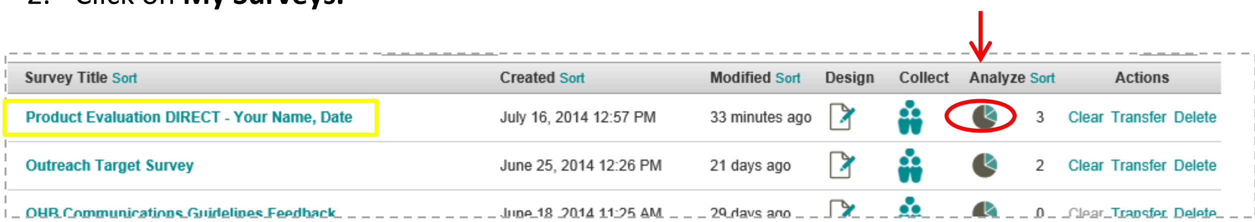
How do I use the Survey Monkey template to create my survey?

Print the Survey Monkey template form(s) you are going to use (see *DIRECT Survey Monkey template, INDIRECT Survey Monkey template).* Have handy your product's core messages and the actions you asked the outreach target or product audience to take before you try to adapt the survey. Adapt the questions and answers for your product/project. It's easiest to hand-write the changes on the template form.

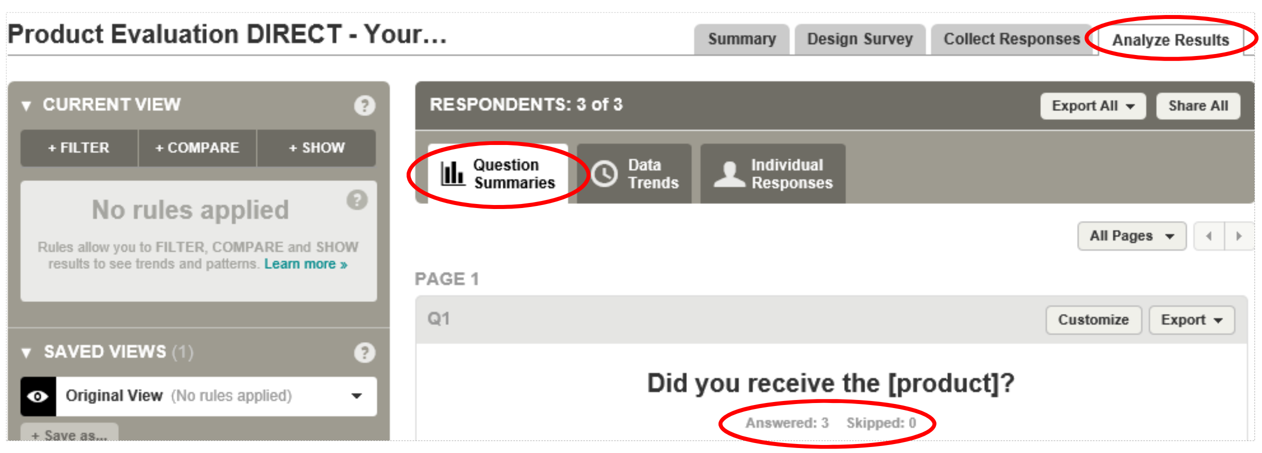
How do I get the results from my Survey Monkey survey?

Survey Monkey collects results in real time, so you can retrieve them whenever you think participants have had enough time to respond. You can also resend the same survey link as a reminder if your numbers are small. The Survey Monkey templates only allow one response per computer, so you don't to worry about duplicate answers. Basic summary results are available through Survey Monkey in a variety of formats. If you want to do more detailed analysis (e.g., look at worker responses vs. employer responses), you can export the results to data analysis software.

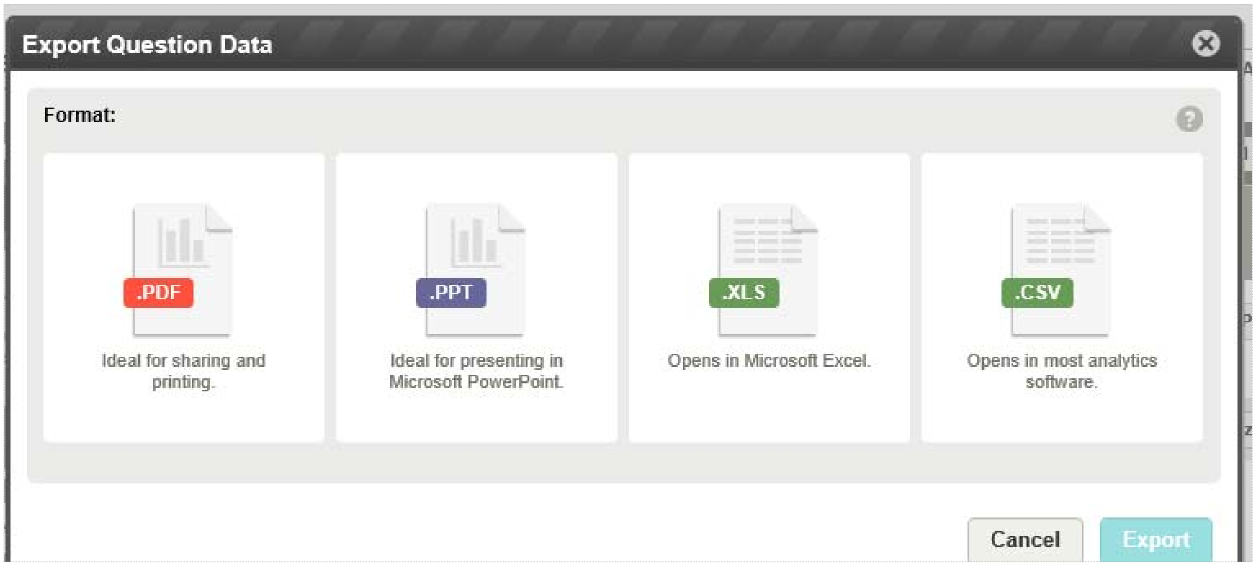
1. Log into Survey Monkey at https://www.surveymonkey.com/myaccount_login.aspx. Enter **Username** and **Password** (case sensitive).
2. Click on **My Surveys.**



3. Find your survey. Click on the **Analyze** icon to the right of your survey name, which takes you to the **Analyze Results** screen.
4. If not already in that tab, click **Question Summaries** to see results for each question.
   - ✓ Tallied results appear as a count and in graph and table formats.
   - ✓ Comments appear as a list. Survey Monkey allows you to tag and sort them by theme, etc.



5. To print the question summary data or export the results for analysis using software such as Excel or SPSS, click **Export** and choose the option you want. There are other more detailed options (Export All, Share All) for exporting survey data in the Analyze Results window.



What do I do with the survey results?

These tips will help you use the basic Survey Monkey tools to look at your results as a whole. If you surveyed outreach targets (OT) and product audience(s), or more than one type of OT or product audience with the same survey, you can also look at your results by participant type. The best way to analyze results by participant type is to import the data from Survey Monkey into data analysis software; you may want to get help from a staff person who is familiar with the software to do this for you. Even if you are not going to analyze your results for different groups separately, it's good to begin by looking at who answered your survey before you interpret the results.

- What best describes you? (Direct Question 7 / Indirect Question 5) - if you surveyed more than one type of outreach target (OT) or product audience, tally these answers first
- Did you receive; did you read/watch the product? (Direct Survey Qs.1 & 2) – tally up the responses (yes/no)
- Core messages(Direct Q.3 / Indirect Q.1) – look at how responses compare to the core messages you identified
- Outreach target / product audience actions (Direct Q.4 / Indirect Q.2) – tally responses for each action; note and tally any actions participants provided in the "other" category. Identify trends, note outlying responses. Compare responses to the desired actions you identified for outreach targets and/or product audience(s)
- Product audience actions (Direct Q.5 / Indirect Q.3) - tally responses for each action; note and tally any actions participants provided in the "other" category. Identify trends, note outlying responses. Compare responses to the desired actions you identified for your product audience(s)

- Suggestions for improvement (Direct Q.6 / Indirect Q 4) - tally responses; note and tally any suggestions participants gave in the "other" category. Identify trends, note outlying responses.
- Look at the data above and discuss the implications of your results in light of these questions:
  - ✓ Does it seem like your effort was worth it?
  - ✓ Is there anything you could/would/should do differently next time?
  - ✓ Do the responses suggest changes to your product that you want to consider?
- Look at the online survey results in conjunction with any data/feedback you may collect from telephone surveys, if you do them.
- Online survey results may also help you identify areas where you need / want more detailed information. You can then use phone surveys for this.

Sample Survey Monkey Questions

Sample Survey Monkey questions – Direct Survey

***[Product name]* Survey**

Please answer these 8 brief questions about our [*product name*]. Your feedback will help us improve our communications efforts!

1. Did you receive the [*product*]?
   - ❍ Yes
   - ❍ No (*skips to Alternative Question 2)*
   - ❍ Don't know (*skips to Alternative Question 2)*

2. Did you [*read / watch*] the [*product*]?
   - ❍ Yes
   - ❍ No (*survey ends here if "no" is checked*)

3. On a scale of "poorly" to "very well", how well do these points come across in the [*product type: factsheet, video, etc.*]?
   Use your product's (2-3) core messages to tailor these questions.

Core Message	poorly	not very well	pretty well	well	very well

4. What did you do or will you do as a result of receiving our [*product type*]? Please check all that apply.
   "Make changes at the workplace" is for your <u>product audience</u>. Tailor the other options to the actions you wanted your <u>outreach target(s)</u> to take; choose from examples below (or add others).

- ❍ Make changes at the workplace
- ❍ Use it to train workers
- ❍ Use it to train members of my organization
- ❍ Use it to train health care providers
- ❍ Nothing
- ❍ Give to workers
- ❍ Share with employers
- ❍ Share with colleagues
- ❍ Share with members
- ❍ Other (please explain below)

Other:

5. After [*reading this/visiting the web page/watching the video*], on a scale of "definitely won't" to "very likely", how likely are you to:
Use the (1 or 2) actions you wanted the product audience to take to tailor these questions. For example: "Ask my employer for a blood lead test", "Provide my employees with the right respirator", etc.

Action	not applicable	definitely won't	not very likely	don't know	quite likely	very likely
Other (please explain below)						

Other:

6. How could we improve this [*product type*]? Please check all that apply. Please use the space at the end to explain your answers.
Use the answers that apply to the type of product you are evaluating.

❍ Provide less information
❍ Provide more information or more detail
❍ Make it easier to read (written materials)
❍ Make the information easier to understand
❍ Use photos or images more effectively
❍ Show more examples or better examples
❍ Other (please explain below)

Other:

7. Which of these best describes you? (*Q. 7 & 8 are on same page*)
   - ❍ Worker
   - ❍ Supervisor
   - ❍ Employer
   - ❍ Health care or health and safety
   - ❍ Advocate (union or community)
   - ❍ Other (please explain below)

Other:

8. Can we contact you for more information?
   - ❍ Yes
   - ❍ No thanks.

Your name and best way to contact you:

Thank you for giving us feedback on our [*product name*]. Your input will help us improve our communications products in the future.

[*Project Name*], Occupational Health Branch, CA Department of Public Health

End of survey

<u>Alternative Question 2</u> (skips to this if respondent did not receive the product.)

We're sorry you didn't receive the [*product name*].

Would you like us to send it to you now?

- ❍ Yes, please! (Please provide your mailing address or preferred email address below.)
- ❍ No thanks.

Mailing address or preferred email address:

Thank you!

[*Project Name*], Occupational Health Branch, CA Department of Public Health

Survey ends here.

Sample Survey Monkey questions – Indirect Survey

***[Product name]* Survey**

Thank you for [*reading/watching/visiting*] our [*product name.]* Please answer these 7 brief questions about the [*product*]. Your feedback will help us improve our communications efforts!

1. How did you find/get the [*product name*]?
   - ❍ Search engine (Google, Bing, etc.)
   - ❍ Clicked a link on a web page
     Name of website (if you remember)
   - ❍ Someone sent me a link to it
     Person or group that sent you the link (if you remember)
   - ❍ Other (please explain)
     Other:

2. On a scale of "poorly" to "very well", how well do these points come across in the [*product type; e.g., factsheet, video, etc.*]?
   Use your product's (2-3) core messages to tailor these questions.

Core Message	poorly	not very well	pretty well	well	very well

3. What did you do or will you do as a result of receiving our [*product type*]? Please check all that apply.

"Make changes at the workplace" is for your product audience. Tailor the other options to the actions you wanted your outreach target(s) to take; choose from examples below (or add others).

- ❍ Make changes at the workplace
- ❍ Use it to train workers
- ❍ Use it to train members of my organization
- ❍ Use it to train health care providers
- ❍ Nothing
- ❍ Give to workers
- ❍ Share with employers
- ❍ Share with colleagues
- ❍ Share with members
- ❍ Other (please explain below)

Other:

4. After [*reading this/visiting the web page/watching the video*], on a scale of "definitely won't" to "very likely", how likely are you to:
   Use the (1 or 2) actions you wanted the product audience to take to tailor these questions. For example: "Ask my employer for a blood lead test", "Provide my employees with the right respirator", etc.

Action	not applicable	definitely won't	not very likely	don't know	quite likely	very likely
Other (please explain below)						

Other:

5. How could we improve this [*product type*]? Please check all that apply. Please use the space at the end to explain your answers.
   Use the answers that apply to the type of product you are evaluating.

- ❍ Provide less information
- ❍ Provide more information or more detail
- ❍ Make it easier to read (written materials)

❍ Make the information easier to understand
❍ Use photos or images more effectively
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Other:

6. Which of these best describes you? (*Q. 6 & 7 are on same page*)
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   ❍ Employer
   ❍ Health care or health and safety
   ❍ Advocate (union or community)
   ❍ Other (please explain below

Other:

7. Can we contact you for more information?
   ❍ Yes
   ❍ No thanks.

Your name and best way to contact you:

Thank you for giving us feedback on our [*product name*]. Your input will help us improve our communications products in the future.

[*Project Name*], Occupational Health Branch, CA Department of Public Health

End of survey