

Evaluating Outreach Strategies and Events

Final Report: March 2003



Key project information

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Project summary – the end of the journey

Over an eleven-month period, the Evaluating Outreach Strategies and Events (EOSE) project evolved from the need to better understand how to reach out to potential learners in the Tri-County area to a pilot implementation strategy that involved two spokespeople, two new promotional materials with a focused message and a targeted outreach model based on word-of-mouth referrals.

Spokespeople summaries/comments

The two spokespeople were asked for an evaluation of their involvement. Among the questions asked was the following:

Question:

What suggestions would you make to others who want to recruit single mothers as spokespeople for their programs?

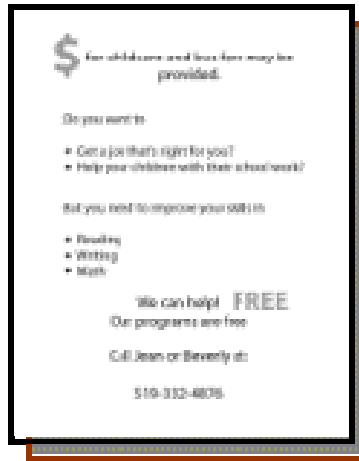
Answers:

Just ask them.

I think that if people feel they are benefiting from the program, they will want to share it with others...I know there are young girls out there who don't know about the programs, and they don't know how easy it is to have it work around them. The program really worked for me.

Tools – fridge magnet and postcard

The fridge magnet and the front of the postcard bear the simple and non-threatening message, *Learn a Living*. The message is complemented by an image of a confident mother accompanied by her two children. The back of the post card profiles program information and benefits of enrollment for single mothers.



Model of direct/word-of-mouth marketing

The outreach model developed in this project was based on both primary and secondary research indicating that the most effective way to reach out to single mothers was through peer, word-of-mouth references.



Final project recommendations

Based on the results of this project, we developed four recommendations:

- 1. We recommend expanding the outreach program piloted through this project in Sarnia-Lambton to other areas of the Tri-County Literacy Network (TCLN) region. It was evident from the administrator surveys that single mothers are underrepresented in programs throughout the TCLN area. Additionally, it was clear that most administrators felt the primary referral method was word-of-mouth. Therefore, by referring to the model developed in this project, we believe other programs could also benefit.*
- 2. We also recommend that programs consider expanding and applying the model to other target groups. For example, an outreach strategy targeting rural adults – identified as the second most underrepresented segment in the TCLN LBS programs – could be developed using the same basic approach used for the EOSE project.*
- 3. For programs that have identified word-of-mouth referrals to be important, we recommend involving current or graduate learners as spokespeople. Helping them prepare for presentations by going over key messages, finding out what types of environments they are comfortable within and supporting them during presentations can help reduce their anxiety, while allowing them an important opportunity.*
- 4. Finally, we recommend that, where possible, outreach strategies rely on a promotional mix, one that incorporates a consistent message delivered through different media that will influence the target market in the desired manner. Although the basis for the EOSE project relied on presentations, supplementing those presentations with promotional materials and public announcements through the media helped to spread the Learn a Living message in the Sarnia-Lambton area.*

Why the journey was important

The impetus for this project grew out of consultations with Tri-County Literacy Network (TCLN) members in 2000. They expressed concerns about the amount of time and energy committed to outreach projects and events and the seemingly low intake rate resulting from these efforts. The dearth of new learners enrolling in the programs was particularly puzzling given the International Adult Literacy Study (IALS) statistics, which suggest that the number of adults in Levels one and two are significantly higher in the Tri-County area than the provincial averages.

Purpose of the project

Reviewing this seeming paradox, Local Planning and Coordination groups and the TCLN Board of Directors supported the development of a project that would “examine the effectiveness of outreach strategies,” including those recently implemented throughout the TCLN area and ones that might be introduced through this project.

Goals/objectives

According to the project proposal, the overall goal of the project was to “evaluate the effectiveness of new and current strategies to reach out to and attract new learners.”

The more specific objectives were:

- 1. To gather information from other Networks, OLC's (Ontario Literacy Coalition) Public Awareness Campaign and ABC CANADA's LEARN Campaign to avoid duplication and enhance the quality of our outreach strategies.*
- 2. To gather information on past and current outreach strategies and plans in the Tri-County area.*
- 3. To develop a tool to track current outreach activities and monitor new strategies or initiatives to be implemented, including the referrals resulting from these.*
- 4. To gather input from the Tri-County LBS administrators and practitioners in order to develop new outreach strategies.*
- 5. To gather input from learners on new outreach strategies.*
- 6. To create new promotional tools based on the input gathered (e.g., role play, poster, etc.)*
- 7. To plan and implement a distribution campaign for new promotional tools throughout the Tri-County region.*
- 8. To document the effectiveness of targeted regional outreach strategies used during this project.*
- 9. To prepare and distribute a final report for all the Networks in the province*

What we did

This section is devoted to reviewing the action plan, research methodology, outreach strategy and evaluation employed in this project.

Original and revised action plans

Using the information from the proposal, the project reference committee and the consultant met in May of 2002 to clarify the project goals, objectives and action plan. The original action plan had presented an eleven-month project. It was scheduled to begin in February 2002 and conclude with the distribution of the final report in December. Although the project did begin in February of 2002, it did not conclude until March of 2003. Delays in the research phase, resulting from summer holidays, in turn delayed the implementation of the pilot outreach strategy, thereby necessitating a request of the funders for an extension by the Executive Director of TCLN in November.

The key difference between the original and revised action plans involved the order of two major research components. Originally, the research was to begin with a review of best practices from other jurisdictions. However, the reference committee agreed that it would be more efficient to first gather input from administrators and practitioners in the TCLN area, addressing both outreach strategies they have used and population segments underrepresented in the programs.

Research methodology

The research for this project consisted of three main elements: interviews with 11 administrators/practitioners, a review of literature on best practices in outreach and two focus groups.

1. Interviews

To help understand both the gaps in learner recruitment and the successes in outreach, a 14-question telephone interview was created. (Please see the Appendix for a copy of the instrument.) Over the course of three weeks, LBS administrators were contacted and asked if they would be willing to participate in the interview, while explaining the purpose, the format and the approximate duration of the interview. The interviewer then scheduled times for the administrators and indicated that he would call at that time to conduct the interview.

The purpose of the telephone interviews with LBS program administrators was twofold:

1. The first was to find out what if any promotional or awareness campaigns, outreach strategies or events organizations have used to recruit new learners and the success of the programs.
2. The second purpose was to identify gaps in reaching out to potential learners in the communities.

The interviews were divided into two sections: the first set of questions addressed the promotional/awareness campaigns, outreach strategies or events, and the second section addressed the gaps within the interviewees' communities. Depending on the flow of the interview, the interviewer adapted the focus of the questioning. This was done for two reasons:

1. To keep the interview to as close to 15 minutes as possible.
2. To obtain information that would best inform an intervention strategy for the EOSE project.

The interviewer used pen and paper to record the answers. These answers were then transcribed to individual interview files on the computer. A total of 11 LBS administrators or recruitment staff were interviewed over the four-week period. The interviews ranged from 12 minutes to 30 minutes in duration, with the average being approximately 20 minutes.

2. Literature review

The results from the interviews indicated that the most underrepresented group of potential learners throughout the TCLN area was single mothers. Using this information, we reviewed relevant resources on reaching out to single mothers. A search of AlphaPlus and NALD materials, combined with an Internet search using google.com and yahoo.com search engines was completed. We were also fortunate to be able to borrow from Judith Anne Fowler's extensive research that was being completed concomitantly for Community Literacy of Ontario's *project Strategies of Our Own: Learner Recruitment and Retention Toolkit*. A copy of the literature review is provided at the end of this report.

3. Focus groups

The third component of the project research involved two focus groups. We used the results from the telephone interviews and the literature review to develop question sets for two groups. (See the Appendix for copies of both question sets.)

The first focus group was facilitated with four women enrolled in the LBS program at St. Clair College in Windsor. It was held on June 20, 2002, from 1:00 until 2:30 pm. The purpose of the focus group was to test some of the inferences that had been drawn from the interviews and the literature review, and to further explore ways to reach out to single mothers in the TCLN area. As part of the introduction to the focus group, the participants were informed that the purpose of the focus group was "to find out more how the learning programs can better advertise and offer their services in the community, especially for single mothers."

The discussion questions were divided into three main categories:

1. *Why did the participants get involved in the program, and how did they find out about it.*
2. *What, if anything, made it difficult for them to participate (e.g., transportation, reputation of the program, their dislike of a school setting, etc.).*
3. *What recommendations they had for advertising programs to other single mothers.*

The second focus group was facilitated with five single mothers not enrolled in an LBS program, but who were participating in the Lochiel Drop-in program in Sarnia, Ontario. This session was not held until October 2, 2002. The gap between the two sessions was largely due to the slowdown in programs over the summer months and the need to obtain permission from St. Clair Child & Youth Services.

The purpose of the second focus group was to further test what we had learned and to validate the information that we obtained in the first focus group. As part of the introduction to the second focus group, participants were informed that the purpose of the focus group was to learn more about “how the learning programs can better advertise and offer their services in the community, especially for single mothers.”

The questions for this session were also divided into three main categories.

1. *What was the level of awareness of the literacy programs in their community, and what were the programs' reputations.*
2. *What might make it difficult for a single mother to participate in a program (the real or perceived barriers).*
3. *What recommendations they had for advertising programs to other single mothers.*

Outreach strategy

Based on the research findings, the reference committee agreed that a focused outreach strategy, employing one or more spokeswomen was likely to be the most successful way of reaching out to single mothers. The committee also agreed that complementing this approach with tangible products that could be distributed and a radio advertising campaign would add value.

The research findings suggested that one of the key messages of the campaign should focus on the availability of childcare. Because of this, the reference committee determined that it would be important to pilot this outreach campaign in an area where childcare was either co-located with or very close to the LBS program being promoted.

LBS programs in the TCLN area were queried to find out which ones might be appropriate. From this inquiry, we learned that for those LBS programs that had childcare or child-minding that was co-located or close by that the availability of childcare openings was limited. Therefore, it became necessary to consider any LBS program that would be able to support the campaign.

The Organization for Literacy in Lambton (OLL) was deemed to be the most appropriate LBS organization to partner with for the outreach campaign for two reasons. First, because they were receiving funding from the local LBS agencies and through fundraising to provide outreach on behalf of LBS agencies within Sarnia-Lambton, their telephone number was already marketed throughout the area. Therefore, they were well positioned to field telephone inquiries for this campaign.

Second, they had identified two potential spokespeople who were willing to work on this particular project.

Spokespeople

With the assistance of Jean Doull, the Executive Director for OLL, two LBS learners were hired as spokeswomen for the campaign. Each woman took the lead in discussing their experiences with other single mothers in two informal group discussions. The first session was held at the Lochiel Drop-In Centre, and the second was held with the YMCA Learning, Earning and Parenting (LEAP) program, both in Sarnia. The two women co-led a third discussion with single mothers participating in a program sponsored by the Sarnia-Lambton Health Unit. The three presentations were held over a four-week period in late January and early February of 2003.

Products

Results from the focus groups indicated that the most appropriate product to distribute to single mothers would be fridge magnets. However, we were also cautioned by single mothers to not include too much information about “literacy” because of the stigma associated with the word.

Initially, we tried to find a supplier who could print on both sides of a magnet. Our intention was to present a simple message on the front, with more detailed information on the back about the programs. We were unable to find such a supplier, so the reference committee agreed to produce a fridge magnet with the simple message and a complementary postcard that would have the same message and imagery on the front, as well as the more detailed information on the back. The fridge magnets and postcards were produced through the Clear Design Centre in Sarnia.

Media

Finally, with additional financial support from the Sarnia-Lambton Training Board, 30-second radio advertisements were purchased for a three-week period. These ads were scheduled to run during the same three weeks that the community presentations were being held. (See the Appendix for a copy of the radio advertisement.)

Evaluation

As part of the original proposal, one of the tools to be created through this project was a revised tracking tool that would enable programs to better monitor the success of their outreach strategies. Once it was determined that the outreach campaign for this particular pilot would focus on direct, word-of-mouth marketing, it was agreed that the revisions to the tracking tool should reflect this particular focus.

The revised tracking tool was introduced to programs in September, and administrators were asked to use it for a one-month period. We had originally intended for the use of this tool to coincide with the outreach campaign; however, delays in implementation of the campaign made this impossible. Subsequently, it was agreed that the data collected by the programs would serve well as a comparative benchmark for the following year, after the campaign had been implemented. A copy of the tracking tool is included in the Appendix.

What we found along the way

Perhaps the most telling finding, and one that set the stage early in this project, came from one of the interviews with LBS administrators. During the course of the interview, the administrator reported: “Let’s not just do something that’s run of the mill – let’s try a non-traditional tack.” The comment exemplified some of the frustrations administrators have felt with implementing mass education and marketing campaigns. The reference committee drew both inspiration and creative license from this and other feedback to develop a project that would be “non-traditional.”

Throughout the project, we garnered a significant amount of information about successful outreach tools and methods, about gaps in program delivery in the TCLN area and, most specifically, about issues affecting the participation of single mothers in LBS programs. This section highlights some of the most important leanings from this project, relying on the formal research findings of the interviews, literature review and focus groups, and our own observations throughout the project.

Interview findings

Overall, we found that the questions provided a suitable base from which to obtain information; however, in most interviews, we did not adhere strictly to the question set, suggesting a problem of flow with the questions. For example, we found that the first set of questions was based on an assumption that people would speak about specific and structured promotional campaigns/outreach strategies. What we found, however, is that half of the organizations had not implemented an outreach strategy. If we had followed the flow of the question set, we would have not obtained information about the “ongoing” outreach practices employed by the organizations and would have skipped to the next question set.

Outreach strategies and events

Based on the responses to the first set of questions, we distilled three main findings:

First, 5 of the 11 organizations appear to have implemented strategies designed specifically to recruit new learners. These strategies are listed below

Organization	Event
1. Windsor Volunteers for Literacy	<i>Reading Tent at International Freedom Festival</i>
2. Lambton-Kent District School Board (participating agency)	<i>Need to Read Festival</i>
3. Organization for Literacy in Lambton	<i>International Literacy Day</i>
	<i>New Years Resolutions</i>
	<i>Booth at Skilled Trades Fair</i>

Organization	Event
4. St. Clair Catholic District School Board	<i>Stepping Stones program in Lambton high schools.</i>
5. Corporate Training and Access Programs – Lambton College	<i>Marketing and outreach through Bev Horodyski at OLL (College helps fund Bev's position)</i>

The other six organizations indicated that they rely on ongoing recruitment.

2. The second major finding relates to the best sources of recruitment. It is clear from the interviewees that the best source has been word-of-mouth. Nine of the 11 interviewees identified this as the best source for recruitment. It appeared that the second most profitable recruitment source has been through communication with other agencies, including Ontario Works, HRDC, Job Connect and the Health Unit.
3. The third major finding is the lack of confidence interviewees had in the mass communication and marketing efforts. Ten of the 11 interviewees indicated that their organizations had used mass print materials such as flyers or brochures. Most interviewees were skeptical about the value of brochures, flyers and posters, especially when used in isolation.

Five of the 11 reported using media outlets (radio – 4; newspaper – 5; television – 2). Of the four who rated the success of these recruitment techniques, nobody assessed any mass recruitment medium as greater than average. One interviewee said, “If we have to pay for radio ads or newspaper ads, I would recommend dropping them [because they are not cost-effective.]” However, another interviewee said it is difficult to know which of the different promotional pieces are successful in “bringing an individual through the door.”

Recruitment gaps

Interviewees identified two major recruitment gaps. The first was single mothers (identified by seven of 11), and the second was rural adults (identified by six). Although interviewees were not asked to prioritize their perceived gaps, the interviewer’s sense was that single mothers was the most pronounced and serious gap. Interviewees identifying single mothers spoke of the problem with accessible and subsidized daycare and transportation. Those identifying rural adults spoke of the stigma associated with a literacy program in a small community and transportation as two key barriers to participation.

Other recruitment gaps identified are listed below:

- developmentally-challenged adults (identified by 3)
- teens (16-19 years) (identified by 2)
- workplace literacy
- ESL adults, especially in rural areas
- seniors
- young men needing math skills.

Interview conclusions and recommendations

Based on the interviewee findings, we developed three major conclusions.

1. First, word-of-mouth appears to be the best channel for recruiting new learners. This was clearly identified by the majority of interviewees.
2. Second, the mass communication/marketing media do not appear to be effective in recruiting new learners in the TCLN area.
3. Third, single mothers and adults in rural communities appear to be the two most significant segments of the population not being adequately recruited in the TCLN area.

Given the findings from the interviews, we developed two recommendations that were used to help direct the remainder of the project.

1. First, we recommended that a recruitment strategy for this project focus on targeting single mothers and/or rural communities.
2. Second, given the overwhelming endorsements for word-of-mouth as the most successful medium for obtaining new learners, we recommended that the strategy focus on this channel.

Literature review findings

Using the results from the interviews as a guide, the literature review was focused on three key topics:

1. factors affecting participation (particularly for single mothers)
2. best practices in recruiting new learners, and
3. marketing and communications.

Drawing from different sources, including the recent research by Judith Anne Fowler for Community Literacy of Ontario (2002), we derived seven conclusions, which we then used to help structure the questions for the focus groups and the initial designs of the outreach strategy. The seven recommendations are reproduced below. (See the complete review of literature at the end of this report.)

1. *The first major conclusion is that programs employing outreach projects must identify their specific market segments and not try to use the same approach for all adults.*
2. *Second, before any intervention can be introduced, extensive research into the motivations and barriers affecting each market segment must be completed.*
3. *Third, any outreach strategy must ensure that program barriers that may inhibit a target's participation must be sufficiently reduced or the outreach strategy is considerably more likely to fail. The example of daycare facilities for single mothers is one of the most pronounced.*
4. *Fourth, word-of-mouth outreach appears to be one of, if not the, most successful channels for reaching adults, particularly women.*
5. *Fifth, the messaging used in the marketing should be positive, and it should address the motivations and perceived barriers of the target market.*
6. *Sixth, program staff need to recognize that an outreach strategy must begin with awareness and education but that it cannot stop there. Marketing strategies need to be ongoing to move the target market along the cognitive to value change continuum (please see the literature review for details).*
7. *Finally, a strategic word-of-mouth marketing strategy must consider the social networks that individuals are a part of, if it is to be successful.*

Focus groups

The two focus groups were designed to validate what we thought we had learned from the interviews with the administrators and the review of literature. Additionally, we wanted to involve single mothers in the design phase of the outreach strategy. Specifically, we wanted to find out what messages and media might be most effective.

Focus Group 1

The first focus group was held with four LBS program participants from St. Clair College in Windsor. All four were single mothers. Below is a summary of the notes from that session, which we have condensed into three key topics:

1. their reasons for participating in the program
2. barriers they faced in participating in the program
3. their recommendations for marketing to other single mothers.

1. Reasons for participation in program

All four participants indicated that they wanted to upgrade their knowledge and skills for a variety of reasons. Although they indicated that their first focus was their children, they also wanted to upgrade for personal and work reasons. Perhaps somewhat different from the literature review findings, it appears that these single mothers were equally interested in the upgrading programs for obtaining and maintaining valuable employment opportunities. For these women, it appears that the program is a vehicle for them to gain better employment, which in turn will help them with their children.

2. Barriers to participation

The four barriers to participation that these women reported were:

1. childcare
2. transportation
3. perceived costs
4. individual fears.

These results are consistent with findings from the literature review. The participants indicated that simply having childcare was not enough. Ideally, the childcare should be co-located with the LBS program in order to allow single mothers the peace of mind to fully participate. As one mother said,

...it's good to have your kids close to you. That way you don't have to sit and stew while you're in class, wondering what's going on 10 blocks away or 20 minutes on the bus. It's so much more convenient to take a break, go downstairs, see how your child is doing. You see she's doing great and you're back upstairs smiling, right back into your books. You don't have to worry, it's taken care of, and that stress is gone.

Transportation was also very important. One mother indicated that she did not drive, and it appeared that one other did not as well. Having transportation fees (specifically bus passes, in this case) covered was a significant advantage for two of the women.

The women also indicated that they initially perceived there would be costs associated with the program, as there are with some of the other programs. This, they said, was a deterrent and so this perception needs to be well addressed in marketing to other single mothers.

Additionally, they identified their own fears as an initial barrier. One mother said this:

I was petrified when I came here. You don't know what to expect, who's going to be here, what type of peers you have. You have no idea about the teachers – what they're like, are they going to talk down to me, are they going to respect me as an adult or are they going to treat me as a child because I don't have knowledge. So that's your fear. When you do get here, the scariest thing about the whole situation is getting here. Once your foot's in the door, it changes automatically for you. In the first 24-48 hours you get to know people and start socializing. You realize - you know - I don't feel so bad, because this lady, that gentleman over there, have the same thing going on as I have. You're not different, everybody is the same here.

Recommendations for reaching other single mothers

The participants overwhelmingly reported that the best advertising would be word-of-mouth. In addition, they indicated that the spokespeople should be single mothers who have gone through the program themselves. One woman said, “If a friend of mine hadn't gone through, I'd still be home probably.”

They also recommended increased advertising, especially with different agencies. They reported that they didn't think the program was well advertised.

The participants indicated that the messaging should focus on boosting confidence and the need for a Grade 12. Interestingly, two participants also indicated that the messaging should shock single mothers. One participant commented:

Start off by shocking them, asking them questions. To get them thinking – well where am I going to be. I have this child, some people need those pushes. They need that shock value.

Additionally, when asked whether they thought that the word literacy carried with it a negative message, they said no. They spoke about the need for understanding that it is not the individual's fault to be at a certain level of education and that everyone can learn.

However, they also spoke about the fear and the guilt associated with being at a certain level. Therefore, there appeared to be some contradictions that required further investigation.

Some of the ideas they presented for advertising included:

- packaging for diapers
- baby cookies
- baby bottles
- picture book showing a mom going back to school (the importance of images, for those who do not have English as their first language and for those with difficulty reading).

Focus Group 2

The second focus group was held on October 2, 2002, with five single mothers not enrolled in an LBS program. Participants were presented with a number of questions to discuss. The results of the discussion are presented according to the following four categories:

1. their awareness of LBS programs in the Sarnia-Lambton area
2. their motivations for thinking about enrolling in an adult learning program and barriers that have or would affect their enrollment
3. sources of information they use
4. advertising ideas and messages.

1. Awareness

It was clear from the participants that the names and descriptions of the local LBS programs were not familiar to them.

2. Motivations and barriers

The results of the discussion were consistent with other research sources. The participants appeared to agree that going back to school is essential for getting ahead in employment and for their children. One woman reported her reason for enrolling in a program:

It's something that you need now. You have to have it. You even have to have college education to probably work a garbage truck. I wasn't qualified to do anything. I didn't want to stay on welfare forever, so that was my incentive. I want my kids to see me working.

Another woman reported:

[I wanted] to do something with my life for them to follow. That's what I want – for them to know that I've worked hard. And even though my daughter was less than one, I still went back and struggled.

The participants also reported a number of barriers that they felt limited the ability of single mothers to participate. Consistent with the other research findings, the participants reported that both accessible childcare and transportation would be significant issues. Several other barriers reported were the timing of the programs and significant people in their lives. One woman, reflecting on her own experiences reported the negative influence of her boyfriend while they were both enrolled in upgrading programs:

He had to start going to school. He had to start doing his upgrading because he could hardly read and stuff. That was awesome. [He thought] he was cool. But not me. He thought it was the greatest thing in the world – he was going back to school – but mine was just shoved under [the carpet]. And that didn't help me wanting to do it...[but] that's why I think now I can do it because he's not there to drag me down.

Another woman commented on the people who could hinder a woman's involvement or progress in a learning program:

It could be your parent, your friend, your sister, your brother, your own children.

3. Sources of information

As part of the research, we wanted to better understand where single mothers might turn for their sources of information. As part of this session, we asked where these women turned for information.

They all commented that the drop-in program and especially one of the social workers was one of their first sources of information. One woman also said:

Before I went to anybody, I'd see what I could find on my own first. If I couldn't, I'd ask someone that I know, like a friend.

4. Advertising

The participants were asked a number of questions about methods and resources to use to reach out to other single mothers in the community. Several recommended involving a spokesperson, while two thought that it was important to have one of the teachers or the coordinator of the program speak.

When asked about their preferences for a promotional incentive to use with the advertising, they all endorsed the fridge magnet concept. Other ideas they presented for advertising included:

- flyers accompanying Ontario Works cheques
- mall displays or presentations
- flyers to distribute through the mail and door-to-door
- advertising on the television.

Finally, they were asked to comment on ideas for possible messages and images. Of the concepts presented and discussed, the most popular message appeared to be “Learn a Living.” The participants also commented that the word “literacy” should probably not be used because of the connotation that a literacy program is for people who cannot read or write at all. One woman reported, “When I hear [the word] literacy, for some reason it just comes across to me as people who have problems reading that need to go there.”

The most popular image presented and discussed was the concept of a woman who had graduated from an educational program with her children at her side.

From research to implementation

The findings from the focus groups, interviews and literature review were synthesized to design an outreach strategy that we thought would be the most effective at reaching out to single mothers in the community. The following are the conclusions that we derived from the research and how we used that information for the pilot outreach project Learn a Living.

Conclusion	Details	What we did
<p>Word-of-mouth advertising is likely the most effective way to reach single mothers.</p>	<p>Having peers who have gone through an LBS program and who can speak about their experiences, as well as program representatives who can answer specific questions would probably be most effective.</p>	<p>We contracted two single mothers, currently enrolled in an LBS program, to serve as spokespeople with single mothers involved in community groups. They were encouraged to speak about their experiences, particularly focusing on their barriers and motivations.</p> <p>A representative from one of the LBS programs was also in attendance at the community presentations to answer program-specific questions.</p>

Conclusion	Details	What we did
<p>Handing out a visual reminder of the programs can help engender a lasting impression.</p>	<p>An image that portrays a single mother in a successful learning environment is important. Also, having bright colors, a phone number and a simple message may be less intimidating.</p>	<p>A fridge magnet and postcard were created, using an image of a mother holding a certificate with two children beside her.</p> <p>The colors purple and gold were chosen because of the positive and confident presentation they offer.</p> <p>The fridge magnet contained the simple message “Learn a Living” along with the phone number for the Organization for Literacy in Lambton.</p> <p>The front of the postcard contained the same image and message as the fridge magnet, but the back provided additional information about availability of funding for childcare and transportation and about what the programs offer.</p>

Conclusion	Details	What We did
<p>Focus on key messages that will resonate with single mothers.</p>	<p>It is clear that child care, transportation and program costs are perceived as significant barriers. Therefore, messages need to address these perceptions.</p> <p>Additionally, desires for a better life for their children and for improving their job opportunities appear to be strong motivators for enrolling in a program.</p>	<p>We tried to convey consistent messages to single mothers through the presentations, the fridge magnet and postcard and the radio advertising.</p> <p>The messages that we promoted focused on funding for childcare and transportation, free programming, and skills upgrading to help them with their career development and role modeling.</p>
<p>Mass communication advertising is not likely to be a cost-effective vehicle for reaching single mothers.</p>	<p>Given the limited financial resources, the concerns expressed by administrators about the limited success of mass communication efforts and the results of the literature review, television, radio and print advertising should play a secondary role, if at all.</p>	<p>With additional financial support from the Sarnia-Lambton Training Board, we decided to supplement the other forms of marketing by purchasing radio advertising with the local radio stations.</p> <p>The 30-second script was designed to be consistent with the messaging on the back of the postcard.</p>
<p>Minimize use of the word literacy in the messaging.</p>	<p>Whether because there is a stigma associated with the word or because people may not think a literacy program offers the appropriate learning programs for their particular needs, the word literacy may not be appropriate for targeting single mothers.</p>	<p>Instead of using the word literacy, we relied on words like learning and upgrading.</p>

A model for outreach

As with all good journeys, we arrived at the end of this one with a great deal of new learning. In an attempt to capture and summarize this learning simply and visually, we have created a model for learner outreach that we present below (see Figure 1). This model is based on one of the critical findings from the administrator interviews: the majority of learner referrals are via word-of-mouth.

1. **Community Learning Assessment** – The main purpose of this step is to identify or confirm current and/or projected gaps in learner participation in literacy programs. In the Evaluating Outreach Strategies and Events (EOSE) project, we identified the two segments of the population that administrators felt were underrepresented in the LBS programs were single mothers and rural adults.

A second function of this assessment is to identify the referral patterns within the geographic area. In our case, word-of-mouth was the primary referral source, followed by third-party organization referrals, including Ontario Works, Human Resources Development Canada and Job Connect.

2. **Learner Target Market Assessment** – Once the gaps in program participation have been identified, the next step involves an assessment of the target market. The two key pieces of information to obtain about each target market are motivations and barriers.

Our research discovered that single mothers in the Tri-County area were motivated by their employment goals and by their desire to be positive role models for their children. We also learned that child care, transportation and attitudes of significant others in their lives were often barriers to participation in upgrading programs.

As part of the learner target market assessment, researchers should also identify the target market's current awareness of programs, as well as what messages, media and channels of communication are most likely to influence them.

3. **Organizational Assessment** – Before any outreach strategy can begin, the organization must conduct its own internal assessment or audit to ensure that it has the capacity to serve the target market and to compare its policies and operations with the barriers identified by the target market. For instance, we found that childcare was the number one barrier identified by single mothers. If a program is unable to offer an attractive solution to this barrier, then the chances are very high that the outreach strategy will fail, even with the most successful marketing strategies.

4. **Environmental Assessment** – Outreach leaders must also identify key opportunities and threats outside the organization that might impact the success of the outreach strategy. For example, are there legislative changes proposed that could affect the target market’s barriers? Similarly, are there proposed changes to the transportation infrastructure? Are there new childcare programs that are close to the LBS program, with which a working agreement could be established? In the case of reaching out to single mothers, answers to these questions would be critical to the success of a marketing strategy.
5. **Outreach** – The actual marketing to the target groups will incorporate messages and media that are expected to have the greatest impact. In our case, we focused the messaging on the availability of funding for childcare and transportation and that the learning programs were free. For word-of-mouth marketing strategies, the use of spokespeople is a significant component.
6. **Evaluation** – Both during and at the end of the outreach strategy, evaluation is an integral component. One of the key pieces of the evaluation should be a tracking tool that allows project leaders to measure the direct impact on LBS programs. However, other more inferential measurements can also be made. For example, the three community presentations we organized reached over 30 women directly. We can also infer that an additional 60 friends and family were informed of the presentations.

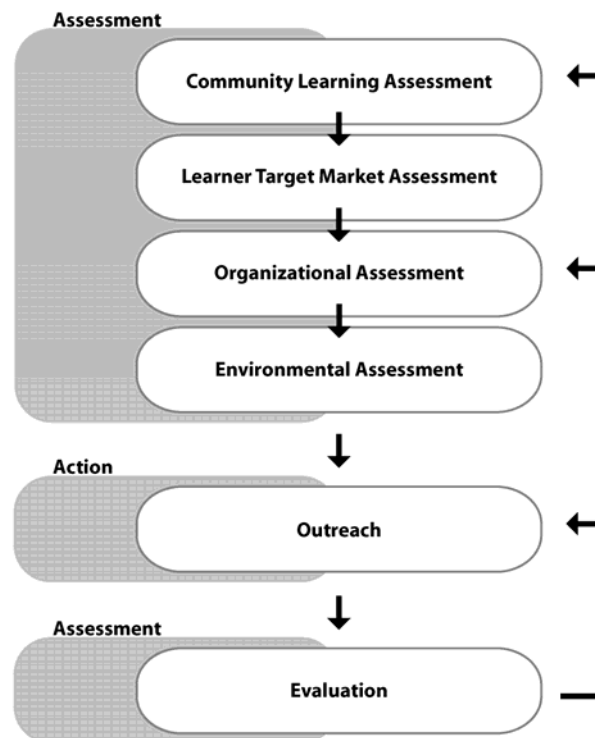


Figure 1 – Learner Outreach Model

Literature Review

Introduction

One of the goals of this project is to better understand why some adults choose to enroll in literacy programs and why others do not. It was theorized at the project's outset that if program staff responsible for recruiting new learners had a better knowledge of the main reasons why adults do and do not participate, they could better design and deliver their outreach strategies.

With this as a basic hypothesis, the review of the literature was designed to inform the project in three key ways.

1. First, we were interested in general information about the factors affecting participants' enrolment in adult literacy programs, including motivation and barriers.
2. Second, we wanted to identify best practices that might have been used in other jurisdictions to help attract and recruit prospective participants, particularly single mothers.
3. Finally, we wanted to review basic marketing and communications research that would impact this particular project

I. Factors affecting participation

The purpose of this section is to review the research to better understand some of the factors that affect participation, particularly for single mothers. Findings from previous studies indicate that the reasons people do or do not enroll in adult literacy programs are numerous, complex and often intertwined.

In a study to help the Kentucky Department for Adult Education and Literacy understand motivations and obstacles influencing potential adult participants, Jensen et. al. (2000) concluded that there is not one marketing campaign that could effectively reach the diverse population of adult learners. Similarly, in a recent study, Long and Middleton surveyed 338 people who had previously contacted one of 55 literacy programs across Canada. The purpose of their research was to better understand "the complex conditions that promote or deter successful participation in adult literacy and upgrading programs." (2001: p. 9)

Factors such as previous education, gender, socio-economic status, age, values, motivations, family support and program policies combine with the individual's awareness of a program to determine whether the individual will participate in an adult literacy program. In this section, we consider two key factors that affect participation rate: individual motivations and barriers.

Motivations

One of the keys to developing a successful outreach campaign is a better understanding of the motivations of the target audience. Knowing what might motivate someone to want to enroll in a program enables the organization to focus the messaging of the campaign in a way that will resonate with that particular segment of the population.

Research into adult literacy enrollment suggests that prospective learners are motivated by intrinsic and/or extrinsic factors. Examples of intrinsic motivators include the desire for personal development, general education, family needs and social interaction. Examples of extrinsic motivators include job-related needs and the need for academic upgrading (National Adult Literacy Agency, 2000; Long and Middleton, 2001; Jenson, et. al, 2000; Kohring, 1999).

Long and Middleton (2001) found that 58% of callers using the LEARN referral system had an intrinsic motivation to call, compared with 42% who reported an extrinsic motivation. Fowler notes, however, that other researchers, including Malicky (1994) and Middleton (1999) have found a higher percentage of respondents reporting an extrinsic reason – especially employment – as their primary motivator.

Deeper analysis reveals that what motivates men and women may be different. In several studies, researchers found that women are motivated more by personal, family or social reasons, while men are motivated more by job-related reasons (Fowler, 2002).

Barriers

Some of the research indicates that appealing to or engendering a prospective learner's motivation – be it intrinsic, extrinsic or both – is only part of the successful outreach equation. The organization implementing a marketing strategy must also have an understanding of the barriers that inhibit participation and address them as part of the outreach. And although researchers have reported that barriers to participation are often “complex and numerous” (Long and Middleton, 2001: p 19), it does appear that a number of key factors influence an individual's *likelihood* of participation in a literacy program, including education, age, gender and family situation.

Education

Fowler (2002) reports that one of the key predictors of successful participation is the level of education. In one survey of over 9000 American adults, researchers found that the amount of formal schooling was the most important predictor. Additionally Hall and Donaldson (1997) interviewed 13 non-participating women between the ages of 18 and 36 and found that the level and quality of formal education and their fathers' levels of education affected their educational decisions.

Long and Middleton also found a “strong and consistent relationship” between the quality of early education experiences and the level of formal education (Long and Middleton, 2001: p. 31). Adults who left the formal schooling system early reported negative experiences.

Other researchers have used *reference group theory* to support the claim that significant others in one’s socio-economic stratum can also impact an individual’s willingness to participate in a literacy program. If, for example, an adult associates with others who do not view a literacy program as a normal social behavior, then the adult may feel pressure to conform to the reference group’s norms and avoid participation. (Fowler, 2002)

Age

Fowler (2002) has reported that, generally, younger adults (up to age 45) are more likely to participate in literacy programs than are older adults (over 45 years). In their follow-up survey, Long and Middleton (2001) found that the highest enrolment category was, indeed, the 35 to 44 year range. However, they also found that the lowest enrolment category was the 25 to 34 year range.

Gender

An interesting finding in Long and Middleton’s work is the ratio of women calling to inquire about literacy programs to women actually enrolling in programs. The authors found that 63% of callers between the ages of 25 and 34 were female, but they also found that the enrolment rate for this age range was significantly lower than any other age range (Long and Middleton, 2001).

Family Situation

Researchers have found that domestic circumstances can have a significant impact on an adult’s participation (Long and Middleton, 2001; Fowler, 2002; NALA, 1998; Hall and Donaldson, 1997, Jensen, et. al., 2000). This barrier is particularly important for women, as evidenced in Long and Middleton’s study that found women between the ages of 25 and 34 who had called to inquire about literacy programs were significantly underrepresented in participation rates versus other age ranges. (Interestingly, however, the authors found that 63% of the callers in this same age range were female.) The authors also found that women were much more likely to cite childcare as a barrier to participation. This finding supports other research that women with young children do not participate because of difficulties associated with childcare (Hall and Donaldson, 1997; Fowler, 2002; NALA, 1998).

While many studies have examined specific barriers to participation, a number of authors have worked to classify the various barriers to participation. Long and Middleton (2001), for example, report that the reasons for non-participation can be generally classified into one of the following categories of factors:

1. **Socioeconomic-circumstantial (SEC)** factors, which include income level, geographic location, health, lack of time, previous education.
2. **Cognitive-emotive (CE)** factors, including self-esteem, values, fears.
3. **Program/policy-related (PPR)** factors, including program visibility, availability and accessibility.

The National Adult Literacy Agency's report Access and Participation in Adult Literacy Schemes has categorized barriers according to the following four headings:

1. **Informational** – which refers to any difficulty accessing or understanding information about a prospective literacy program.
2. **Situational** – which considers aspects of an individual's life that make it difficult to participate.
3. **Institutional** – which are barriers associated with the educational system that are perceived by prospective learners, including previous experience with a formal educational system and inflexibility of the andragogical teaching models.
4. **Dispositional** – which refers to the individual's feelings, attitudes and perceptions and how they might inhibit participation.

The research into motivations and barriers to participation suggests that an individual's decision to enroll in a literacy program is likely complex and influenced by a myriad of both internal and external factors. However, it also appears from the literature that there are commonalities across different market segments that should be addressed when programs are marketing their services.

II. Best Practices in Recruiting New Learners

The second section of the literature review investigates studies that have examined the success of different recruitment techniques and tools.

Perhaps the most sobering find in the literature is reported in the report by Jensen et al. entitled Reasonable Choices: Understanding why under-educated individuals choose not to participate in adult education. The authors claim that, because of the diversity of the under-educated population, "there is no one marketing campaign that will reach [them]." (Jensen et. al., 2000; p.3)

Several other authors use this same conclusion to justify the need for clearer and more refined outreach strategies that target specific segments of the market. Quigley (1997) argues that literacy programs must clearly understand what group of non-participants they are targeting before beginning a marketing strategy. As part of this assessment,

programs need to identify their own strengths and weaknesses and their perception within the community. Beder contends that programs need to ask four basic questions to help identify their target markets.

1. *What subpopulations exist in our community?*
 2. *What subpopulations do we want to serve?*
 3. *How will we identify their specific learning needs?*
 4. *How will we contact the potential students and interest them in the program?*
- (cited in Fowler, 2002)*

Solorzano (1993) argues that programs need to understand local community needs before marketing their services. The author contends that one of the main reasons programs have difficulty recruiting students is because they “have not identified their outreach targets.” (p.46) To combat this, Solorzano suggests that outreach strategies should incorporate a survey to identify specific community needs for any potential clientele.

Fowler (2002) and Kohring (1999) also highlight the importance of segmenting the market and identifying each segment’s specific needs. Fowler argues that a number of variables, including motivation, attitudes, age, gender and educational experience need to be understood before any kind of outreach strategy can be implemented.

Once a program has an understanding of the specific market or markets it wants to target, it then needs to identify the best methods and resources for reaching the prospective learners. In the third section, we will review some of the literature on general social marketing principles; however, in the remainder of this section, we want to consider some of the best practices that have been employed to recruit new learners, particularly single mothers.

Referring to a study conducted by the United States Department of Education, Solorzano (1993) highlights that proven effective recruitment strategies have included the following:

1. recommendations of friends and peers
2. testimonials from successful participants, current students and program staff
3. advertisements in newspapers and magazines
4. radio and television public service announcements
5. third-party referrals (e.g., child care programs, the children’s library section of libraries).

Through interviews with staff in 13 literacy programs in four cities across Canada, MacKenzie (1995) found similar results. She found the following four recruitment strategies to be most effective:

1. word-of-mouth
2. referrals from community service organizations
3. radio and television public service announcements

4. referrals from schools.

Kohring (1999) reports similar findings. Referring to the work of Balmuth (1988) and Martin (1989), Kohring contends that learner recruitment strategies can be divided into personal and non-personal categories. Personal recruitment strategies include word-of-mouth referrals (from friends, family, students, teachers and other community members) and door-to-door canvassing. Non-personal recruitment includes advertising and public service announcements, posters and fliers.

While several authors have reported the importance and success of non-personal recruitment (Kohring, 1999; NALA, 1998; Long and Middleton, 2001), most of the research reviewed suggests that recruitment through personal contacts is the most effective. Solorzano (1993) argues that for the hard-to-reach markets, word-of-mouth strategies tend to be more successful, while the mass media campaigns appear to work well with more educated adults. Long and Middleton (2001), however, found almost the opposite. In their survey, they found that adults with some postsecondary education were more likely to learn about a program through a friend or family member, while adults with lower levels of education were more likely influenced by advertising and promotional campaigns.

One study found that prospective students often have a greater level of trust for current and recent students than they do for tutors and organizers. They found that “involving students in recruitment and training them in various forms of outreach work appears to be one of the most effective methods of increasing participation.” (NALA, 1998; p 33)

Solorzano (1999) cautions, however, that programs using word-of-mouth and other personal contact recruiting should be delivered by people who are respected by the target market, including the adults’ peer group, friends or relatives, and former or current students. Kohring (1999) reports a similar finding and suggests that canvassing “will be most successful if the recruiters are perceived to be trusted members of the community and/or individuals from similar ethnic and cultural backgrounds as the adults who are being recruited.” (Kohring, 1999; p.3)

The National Adult Literacy Agency (2001) report found that men were more likely to hear about literacy programs through a public notice or flyer, while word-of-mouth recruitment was more effective for adults who had not attended secondary school and for women. Mackenzie (1995) found that interviewees from two women-only literacy programs cited the importance of community service organizations for referring women. These findings differed from the interviews MacKenzie conducted with mixed programs, supporting the idea that women may rely more on personal contact sources for obtaining information about literacy programs than do men.

In addition to investigating the delivery channel (personal versus non-personal), several authors have researched the importance of the message itself. Solorzano (1999) contends that the message should be matched with the target audience’s needs. He notes that successful recruitment strategies employ messages that state upfront that programs can

address adults' basic concerns, including child care, transportation and counseling services.

Additionally, the messaging may need to address the stigma associated with literacy. Researchers for the National Adult Literacy Agency reported that embarrassment about being perceived as illiterate was the primary deterrent to participation. Therefore, they argue, it is important to use positive messages that raise self-esteem, "rather than focusing on deficiencies." (NALA, 1998; p. 35)

According to Veronica McGivney (1990), recruitment strategies targeted at women with dependent children must be able to address their key concerns, which include lack of time, transportation and childcare. And to attract this segment of potential learners, the messages communicated must convince the women that these needs and concerns can and will be addressed. Kohring has identified some of the many different ways that messages have been communicated to adults about community programs:

- contests for recruitment
- booklets distributed to target markets, including mothers
- video display in supermarkets
- placemats in restaurants
- advertisements in welfare cheques
- targeted advertising at food banks
- pizza box flyers
- restaurant menus
- calendars
- printed grocery bags
- special displays at grocery stores
- women's shelter referrals
- radio talk show using students

III. Marketing and communications

The research appears to support the hypothesis that attracting adults, and particularly single mothers, to a literacy program is a difficult and possibly daunting task for program staff. As the authors of one study conclude, "adult education programs directly compete with everyday priorities, including work, family and community responsibilities in complex ways." (Jensen, et. al. 2000; p. 1) For programs to compete, they need to understand why adults do and do not participate, and they need to know what approaches appear to work and which do not.

However, staff charged with the task of recruiting should be familiar with some of the basic principles of marketing and communication as well so that they can adapt to their own local needs and opportunities. The final section of this review is devoted to some of the basic literature on marketing and communications that impact recruitment. The first subsection briefly considers the discipline within marketing called social marketing. In

the second section, we present an overview of some of the relevant research in communications theory. And finally, because of the apparent success of word-of-mouth marketing as an outreach strategy, we review some of the research on this phenomenon¹.

What is social marketing?

A social marketing strategy is one that combines the best elements of marketing, communications and social change theory to encourage people to act in such a way that will benefit society. According to the Health Canada Social Marketing Network web site, social marketing is “a planned process for influencing change.” McKenzie-Mohr and Smith (1999) refer to it in its simplest form as “the selling of ideas,” and in more complicated terms as “the creation, execution and control of programs designed to influence social change.”

Historically, successful movements for social change have included the abolition of slavery and child labour, and the promotion of the women’s suffrage movement. More recently, we have seen social marketing programs targeted at drinking and driving, physical fitness, racism and environmental conservation.

Differences between corporate marketing and social marketing

Social marketing, while borrowing tenets from corporate marketing, differs from its private sector counterpart in two fundamental ways (Kotler and Roberto, 1989; Ministry of Health Ontario, 1992).

¹ The majority of the information for this section first appeared in the Ontario Literacy Coalition’s Building Momentum and Finding Champions for Workplace Literacy in Ontario: Research Report, 2002. It is reproduced here with permission of the Ontario Literacy Coalition.

i. Selling of ideas

At the basic level, social marketing differs from corporate marketing because of the product that is being marketed. Corporate marketing seeks to have the target audience buy a particular product or service. For instance, a computer company will try to sell its line of computers, while a consulting company will try to sell its service to prospective clients. For the creators of a social marketing strategy, however, the objective is to have the target market first agree with a concept or cause and then spur them on to action.

ii. Need to change behavior, not channel behavior

According to McKenzie-Mohr and Smith (1999), another critical difference between corporate and social marketing is the nature of the objectives. In a corporate strategy, the company or marketing agent is typically only trying to change or maintain the direction that the target is following. For example, in trying to convince an individual to purchase one brand of hair shampoo over another, there likely is not the need to convince the individual that shampoo is important. Instead, the task of the marketing agent is to persuade the buyer that shampoo X is superior to shampoo Y.

With a social marketing strategy, the marketing agent must first convince the target market that improving their literacy skills is important. Only when that is complete can literacy programs expect the target market to consider enrolling in a program.

As Kotler and Roberto argue, “every social cause has a social objective” that involves eliciting change. According to the authors, change can occur at four different levels, and, depending on the change that is desired, this can be relatively easy or difficult to achieve (1989).

1. **Cognitive change** – This is the easiest to elicit. For example, changing the public’s perception that literacy is an issue in Ontario is relatively simple, provided there is sufficient resources to educate them. Achieving change at this level often relies on an awareness strategy.
2. **Action change** – This is somewhat more difficult because it involves getting the target to act in a certain way. For example, if an individual believes that literacy is an important issue, and there is an open house at the local literacy office, he or she may be inclined to attend.
3. **Behavioral change** – This is increasingly difficult. At this level, the desired effect is to have people change their routine. For one individual, it may mean volunteering his or her time to tutor. For a potential learner, it may result in enrolling in a program to benefit herself and her children.
4. **Value change** – the most difficult to elicit with the lowest success rate. At this level, a change in values begins to address a person’s basic identity building blocks. When we question our values, we question who we are as individuals.

In order for a social-change program to succeed, it must meet the following criteria:

- It must be fairly consistent with the specific attitudes and/or values of the specific target.
- It must be compatible with the existing culture. In the case of workplace literacy, there must be a favorable culture of training within the organization.
- There must be an element of *demonstrability* to the program. Specifically, the target must be able to see the value of the program.
- The financial costs and the ease that accompany the change must not be restrictive. Similarly, the target must feel that the potential loss from changing from the status quo will not be excessive.

In order for a social marketing strategy to be effective, it must focus on bringing about some kind of change in the way the target acts and/or thinks. McKenzie-Mohr and Smith (1999) succinctly describe what a successful social marketing strategy must do:

The function of a social marketing program is to change the ratio of benefits and barriers so that the target behavior becomes more attractive.

To achieve this goal of changing the target's perception of the benefits versus the barriers, the program staff need to understand some of the fundamentals of marketing. Several authors have borrowed the **4Ps** model from corporate marketing as the framework in which to effectively elicit the desired response. Specifically, the social marketing strategy should address:

1. **Product** – the knowledge, attitudes or behavior the organization wants the target to adopt.
2. **Price** – the costs that the target market will have to pay. Although these can be monetary, they are more often the perceived costs associated with the change, often taking the form of time and inconvenience.
3. **Place** – the locations and means through which the target will learn about the new concept.
4. **Promotion** – the methods and materials used to promote the social product or service to the target. Often the different methods used in the promotion are together referred to as the *promotional mix*.

Some social marketers have suggested that three additional Ps should be added to this model, especially for the delivery of services (see for example McKenzie-Mohr and Smith, 1999).

5. **Personnel** – those who will be responsible for selling and delivering the product or service.
6. **Presentation** – the sensory stimulation that is directed at the target to aid with the marketing of the product or service.
7. **Process** – the steps that the target market goes through as part of their adoption of the new service or product.

In their review of different social marketing strategies, Kotler and Roberto (1989) have identified six ideal factors that indicate whether a social marketing campaign will be successful.

1. **Monopoly** – if no competing messages exist to interfere with the messages promulgated through the marketing campaign, the likelihood of success increases.
2. **Canalization** – if a pre-existent positive attitude toward the service or product exists, then the marketing strategy merely needs to direct the attitudes and not create new ones.
3. **Supplementation** – combining personal communication (i.e., face-to-face) with a mass communication approach is more likely to succeed than mass communication alone.
4. **Direction** – for the target to respond in the desired fashion.
5. **Mechanisms for response** – an agency or office that allows the agency to move into action.
6. **Distance** – minimizing the individual's perception of the energy and cost required to change an attitude or behavior.

Communication theory

Once the problem has been identified, the literacy program must work towards developing a message or series of messages that will register with the target audience in a way that is considered meaningful. Therefore, the success of a social marketing campaign relies extensively on effective communication (Kotler and Roberto, 1989).

At its most basic level, the communication model begins with an idea that the sender has, proceeds to the transmission of that message and concludes with the receiver(s) obtaining and processing the message.



Figure 2 – Three key elements of communication model

This model, based on Claude Shannon’s research for Bell Labs in the 1940s (Shannon, 1948; Technical Communications Group, 2001), while simplistic and outdated, does identify the three key ingredients that any communication strategy must address: sender, message and receiver.

Barriers to effective communication

The model in Figure 1 could be called the utopian communications model because it does not consider the potential barriers that affect the flow of information from the sender to the receiver. These barriers are often referred to as “noise” that disrupt the delivery of messages (Guffey et. al., 1999; Smith, 1993; Pepper, 1995).

Barriers affecting sender

The primary barrier affecting the sender is the lack of clarity about the goals of the communication strategy (i.e., “What do we hope to achieve?”). For many organizations, the goals are overly optimistic. For example, to expect a target audience to commit to some kind of action without fully comprehending the issue – or, even worse, not being aware of it – is unrealistic.

The figure below highlights the different stages of awareness and acceptance we have towards an issue. From a communications model, this five-stage hierarchy demonstrates that for a new issue, the audience must first be made aware of the problem. Once that is complete, the next goal would be to ensure they comprehend the seriousness of the issue. Finally, after convincing them that action is necessary, the last message to be delivered would be a persuasive one showing them how to become involved (Smith, 1993).

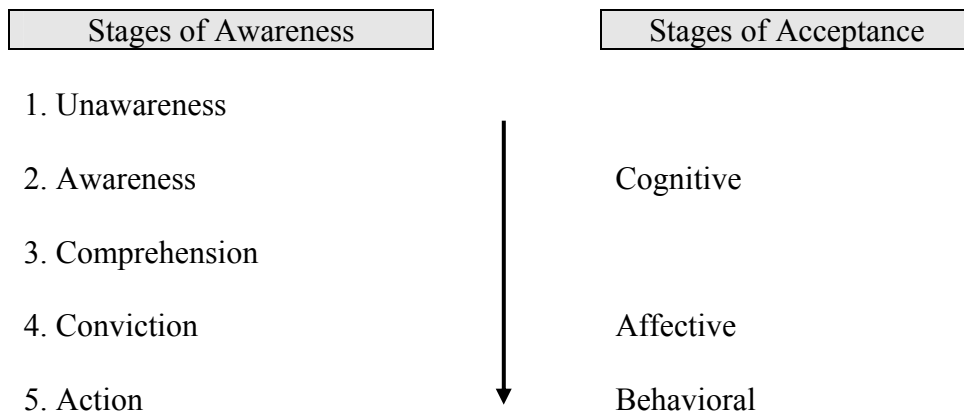


Figure 3 – Stages of Awareness and Acceptance

Barriers affecting receiver

For most, if not all, communication plans, the question “What do we hope to achieve?” cannot be properly answered without first analyzing and understanding the receiver or target audience. For a message to have its greatest impact on the intended audience and to reach the greatest number, the sender must understand the audience. Using a stimulus-response model, Smith (1993) has identified the importance of different variables on the receiver’s ability to interpret a message and respond in a way that is consistent with the sender’s goals.

Perception

According to perception theorists (see, for example, Mayfield, 1994), the way we interpret and respond to a message is often dependent on how our senses perceive it. Physical properties, such as color, sound, contrast, repetition, size and intensity affect whether we perceive and register a message. Our perceptions are also based significantly on previous experiences. Depending on our priorities (personal, cultural or environmental), some messages will register while others will not. Therefore, if a sender wants to ensure that the message is perceived in the same way that she/ he sends it, he/she should try appealing to different senses and different receiver motivations.

Background

Other variables, including personality traits, social and ethnic background and learning styles, also impact the effectiveness of the message delivery. These, in turn, affect the receiver’s motives, attitude and level of knowledge about any particular message being delivered to them (Mayfield, 1994).

Barriers affecting message transmission

Finally, theorists claim that environmental circumstances also affect the transmission of messages (Guffey et. al., 1999). Two of the key external variables to consider are:

1. **The channel of delivery and distance** – Face-to-face communication is most likely to result in successful transmission, whereas an advertisement in a newspaper will be much less likely to reach the audience in the intended manner.
2. **Technology** – Depending on the sender, receiver and complexity of message, technology can assist or hinder the transmission of messages. For example, two colleagues accustomed to communicating through e-mail will argue the communication process is improved through this technological medium. However, the same ease of communication may not be realized with a new contact outside of the organization, depending on the technological infrastructure, the receiver's level of comfort with electronic mail, etc.

IV. Word-of-mouth marketing

It is clear from the review of literature that word-of-mouth is one of the best, if not the best, communication channels for recruiting new adult learners. In the first section, we learned that word-of-mouth referrals often result when current or recent students tell friends or family members about a particular program. In this last section, we consider why is it so effective.

In his book *The Anatomy of Buzz*, Emanuel Rosen refers to successful word-of-mouth marketing as “buzz.” This he defines as “the aggregate of all person-to-person communication about a particular product, service or company at any point in time” (Rosen, 2000; p.7). In an Internet article, Ralph Wilson (2002) refers to word-of-mouth marketing as “viral marketing” and defines it as “a strategy that encourages individuals to pass on a marketing message to others, creating the potential for exponential growth in the message's exposure and influence.”

Buzz or word-of-mouth marketing appears to be successful because it eliminates much of the *noise* between sender and receiver often associated with mass advertising campaigns. Potential communication barriers such as receiver background and the distance between the sender and receiver are eliminated when a family member (who shares and understands the receiver's background) tells another family member about the literacy program she/he is attending (Pepper, 1995).

Wilson (2002), argues that a successful word-of-mouth strategy is dependent upon a number of key elements, including the following:

1. **The understanding and use of social networks** – According to Rosen (2000), one of the keys to successful word-of-mouth marketing is an understanding of the role we all play in our own social networks. Because each person has between 500 and 1500 contacts across different networks (family, friends, work, recreation, etc.), it is important to market not just to the individual, but also to networks of which she/he is a member.
2. **The ability to give something away for free** – Wilson argues “free is the most powerful word in a marketer’s vocabulary” because it attracts people’s attention better than any other single word. Rosen calls this practice active seeding. Citing the example of Tom Peters’ book *In Search of Excellence*, Rosen tells how the publishers gave away 15,000 copies of the book before it was officially for sale. This strategic launch helped to generate sales of over 1.5 million copies of the book (Rosen, 2000).
3. **The easy transferability to others** – Using the example of a real virus – the flu – Wilson argues that a successful word-of-mouth marketing strategy must ensure that the product and, more importantly, the message are easily transferred from one person to the next. He refers to the very successful promotion of Hotmail.com as an example. The message, “Get your private, free email at <http://www.hotmail.com>” worked because it is simple, easy to remember and, using the Internet, easy to transfer to others.

Conclusions

From the review of literature, it is apparent that many factors – both intrinsic and extrinsic – work together to affect an individual’s decision to enroll in a literacy program. And although it is virtually impossible to identify all the factors for each targeted person, there are a number of significant conclusions that can be drawn from the research, which can aid this project and the application of adult literacy outreach strategies.

1. The first major conclusion is that programs employing outreach projects must identify their specific market segments and not try to use the same approach for all adults.
2. Second, before any intervention can be introduced, extensive research into the motivations and barriers affecting each market segment must be completed.
3. Third, any outreach strategy must ensure that program barriers that may inhibit a target’s participation must be sufficiently reduced or the outreach strategy is considerably more likely to fail. The example of daycare facilities for single mothers is one of the most pronounced.
4. Fourth, word-of-mouth outreach appears to be one of, if not the, most successful channels for reaching adults, particularly women.
5. Fifth, the messaging used in the marketing should be positive, and it should address the motivations and perceived barriers of the target market.
6. Sixth, program staff must recognize that an outreach strategy must begin with awareness and education but that it cannot stop there. Marketing strategies need to be ongoing to move the target market along the cognitive to value change continuum.
7. Finally, a strategic word-of-mouth marketing strategy must consider the social networks that individuals are a part of, if it is to be successful.

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Appendix A – Administrator and practitioner telephone interview questions

Tri-County Literacy Network – Evaluating Outreach Strategies and Events Project

Date:	Time:
Interviewee name:	Tel:
Position:	
Organization:	

Section 1 – Promotional/awareness campaigns and events

The first set of questions concerns promotional and/or awareness campaigns that your organization has used to attract new learners.

1. Has your organization used a promotional campaign to attract new learners within the last two years?

Yes No (if no, skip to Question 10)

2. What was the name of it?
3. When did it run?
4. Where did it run?
5. How long did it last?
6. Who was it directed at?
7. Why did you run this particular campaign?

8. What types of media did you use?

Brochures/flyers Radio ads T.V. ads Presentations
 posters Newspaper ads Web site Displays

Other #1
Other #2

9. I would now like to find out how successful you think it was. Would you say it was:

Poor
 Fair
 Average
 Good
 Excellent

Section 2 – Outreach gaps

The next set of questions concerns any gaps that your organization has identified in meeting literacy needs within your community.

10. Would you say that there are literacy needs within your community that are not being as well addressed as they could be?

- Yes No (if no, skip to end)

11. Can you tell me what segment of the community is not being served as well as you think it should be?

12. What evidence have you seen that makes you believe this gap in service exists?

13. To the best of your knowledge, have there been any attempts to reach out to this segment of the community through an awareness campaign?

- Yes No (if no, skip to end)

14. What can you tell me about the campaign?

What was it called?	
Who organized it?	
When was it held?	
Where was it held?	
What were the results?	

That's it! Thank you for your time.

In the event that we need to find out more about (either the campaign or the gaps), would you be willing to discuss (either the campaign or gaps) in greater detail?

- Yes No

Appendix B – LBS focus group question set

Section I – Motivations

1. (Going around the table.) First, please tell me your name, where you're from and the age of your child or children.
2. (For everyone.) Next, tell me why you got involved with the adult upgrading program. At this point, I don't want to talk too much about how you got involved (we'll get to that soon). I just want to get a better sense of what motivated you to become involved.
3. How did you find out about the program?
4. What did you know about the program before getting involved? Did it have a good reputation in the community? Why or why not?

Section II – Barriers to participation

5. Were there any barriers to you getting involved? What were they? (Depending on the answers, ask what finally made them decide – the perceived values versus barriers gap.)
6. So when you decided to get involved, what did you have to do? What were the steps you took? Did people help direct you?
7. If you could change things, how would you make it easier for other single mothers to become involved?

Section III – Outreach channels and messages

In the next set of questions, I want to find out what you think would work if St. Clair College were to advertise to other single mothers in the community.

8. So, first question is what are some the ways that you think would be best to reach out to single mothers and let them know the program exists? (Possibly refer them back to their answers about how they heard about the program.)
9. What are some advertising things that might make an impression? (ads, cups, free diapers, etc.)
10. Do you have any ideas about what should be in a message that would go out to single mothers? Things that would grab your attention. (What about the word literacy?)

Appendix C – Non-LBS focus group question set

Introductions

1. (Going around the table) First, please tell me your name, where you're from, the age of your child or children and whether you're in any kind of education program right now.

Awareness

2. How many of you are familiar with (X) learning program (will correspond to the learning Literacy and Basic Skills program being marketed)?
3. What do you know about it? (Getting at understanding their perception of what the program offers as well as the community perception of the value of the program)

Motivations

4. (Beginning with those who have enrolled in an educational program besides regular high school)...What were your reasons for going back to school?
5. (Follow, if necessary, with those who are not enrolled in an educational program)...Are any of you thinking about signing up for an upgrading program? What are your reasons for wanting to do this?

Barriers

6. What do you see as some of the barriers for single mothers to participating in an upgrading program?
7. What do you think would be good ideas for getting rid of some of those barriers so that single mothers who want to participate can?

Information Sources

8. When you're looking for information to help you with finding jobs or with your children, where do you go? What sources of information do you trust and rely on the most?

Outreach channels and messages

In the next set of questions, I want to find out what you think would work if (X program) were to advertise to other single mothers in the community.

9. So, first question is what are some the ways that you think would be best to reach out to single mothers and let them know the program exists?
10. What are some advertising things that might make an impression? (ads, cups, free diapers, etc.)
11. Do you have any ideas about what should be in a message that would go out to single mothers? Things that would grab your attention. (What about the word literacy?)

Final comments

- Do you have any other comments, ideas or questions?

Appendix D – Fridge magnet and postcard designs

Fridge magnet



The fridge magnet was designed using a two-color process. The lighter background color is gold and the image outline, telephone number and shape around the “Learn a Living” slogan is purple.

The circular shape was chosen because of the softer quality and to represent the cycle of influence a mother’s decisions have on her children.

The word literacy was omitted because of the concern that single mothers might feel uncomfortable displaying this in a public place.

Postcard

Front



Back



The front of the postcard carried the same imagery and simple message as the fridge magnet. The back of the postcard presented more detailed information, beginning with the message that money might be available for childcare and transportation – the two most significant barriers to participation for most single mothers.

Appendix E – Radio ad

Learn a Living 30 second radio ad

Are you trying to find a job that's right for you?

Are you looking for ways to help your children with their school work.

Do you think you might need to improve your skills in reading, writing or math?

We may be able to help you with your goals.

We offer free upgrading programs for adults.

And, as a single mother, you may be eligible for money for childcare and transportation while you are learning.

Call Jean or Beverley at 332-4876 for more information.

Call today and find out how you can learn a living.

Appendix F – TCLN Referral Summary Report

SOURCE OF REFERRALS – PART I

A.	Chatham Kent Council on Adult Basic Education
B.	Lambton Kent District School Board – Chatham-Kent
C.	St. Clair Catholic District School Board – Chatham-Kent
<hr/>	
D.	Lambton Kent District School Board – Lambton
E.	St. Clair Catholic District School Board – Lambton
F.	Organization for Literacy in Lambton
G.	Lambton College
H.	Walpole Island First Nation
I.	Aamjiwnaang First Nation
<hr/>	
J.	Greater Essex County District School Board – Leamington
K.	South Essex Community Centre – Leamington
L.	Greater Essex County District School Board – Windsor
M.	St. Clair College - Windsor
N.	Windsor Public Library
O.	Unemployed Help Centre
P.	Centre Alpha “Mot de passe”
Q.	Can Am Indian Friendship Centre
R.	Tri-County Literacy Network
S.	Ontario Works (Mandatory)
T.	Ontario Works
U.	Human Resources Development Canada
V.	Job Connect
W.	Workplace
X.	Ontario Disability Supports Program
Y.	Workplace Safety and Insurance Board
Z.	Credit Program
AA	Self Referral/Word of mouth (see Part II form for a breakdown)
AB	Advertising (see Part II form for a breakdown)
OTHER	
<hr/>	

Tri-County Literacy Network Referral Summary Report SOURCE OF REFERRALS – PART II

WORD OF MOUTH

AA – Workplace
AB – Family member
AC – Friend
AD – Current learner

ADVERTISING – If possible find out the specific source in each category

AE - Community Event (e.g., Need to Read, International Literacy Day, International Freedom Festival)
AF - Mall display
AG - Yellow Pages TM
AH - Radio
AI - Television
AJ - Newspaper ad
AK - Newspaper article
AL - Magazine ad
AM - Magazine article
AN - Flyer (where was it seen?)
AO - Brochure (where was it seen?)
AP - Poster (where was it seen?)
AQ - Other

NEW ADDITIONS

CL - Community Living Association (which one?)
ESL - English As A Second Language
MCC - Mennonite Central Committee

Appendix G – Summary of monthly activities

TASK	DETAILS	DATE COMPLETED
Development of detailed project plan	<ul style="list-style-type: none"> • Using the input from the reference committee meeting, we developed a project plan using Microsoft Project. • We then submitted the plan to Andrea Dickinson for review and made several modifications based on her feedback. 	April 11, 2002
Literature review	<ul style="list-style-type: none"> • With a clearer sense of direction for the project, we began to collect secondary information on recruitment of adult learners. Several key sources were provided by Judith Fowler (consultant and former Simcoe County Literacy Network Executive Director), who is currently working with Community Literacy of Ontario on a recruitment and retention project. 	April 15, 2002
Membership telephone interview	<ul style="list-style-type: none"> • We developed the telephone interview question set using the input from the reference committee. • The interview was designed to obtain information about various outreach strategies and events used throughout the TCLN area, and to identify learner recruitment gaps. • The contact list for administrators in the region was provided by the TCLN office. • The first draft of the question set was sent out to the reference committee in the middle of April, and feedback was received over the following two weeks. 	April 30, 2002
Membership telephone interview	<ul style="list-style-type: none"> • Using feedback from the reference committee, we developed a final version of the telephone interview question set. • Using the LBS contact list provided by TCLN, we attempted to contact administrators at all programs (total of 14) to establish interview times. 	May 27, 2002

TASK	DETAILS	DATE COMPLETED
Reference committee meeting	<ul style="list-style-type: none"> • Robb presented an overview of the interview findings to the reference committee. • We discussed the possible target markets for the outreach intervention. • The two most pronounced from the interviews were single mothers and adults in rural areas. • Additionally, Robb indicated that the vast majority of interviewees to-date said that word-of-mouth was the best channel for obtaining new learners. 	May 27, 2002
Membership telephone interview	<ul style="list-style-type: none"> • We completed the telephone interviews with LBS program administrators • A total of 11 were conducted by the end of June • A summary of the findings was forwarded to the reference committee for review and feedback 	June 28, 2002
LBS participant focus group	<ul style="list-style-type: none"> • Using results from the telephone interviews and the literature review, we compiled a set of focus group questions to lead the discussion. The draft question set was forwarded to the reference committee for review and feedback • Robb worked with Walt Stechsyhyn from St. Clair College to coordinate a focus group with single mothers currently enrolled in the LBS program • Robb facilitated a 1½ hour focus group with four participants from the program at St. Clair College on June 20 	June 20, 2002
Reference Committee update	<ul style="list-style-type: none"> • Robb updated the reference committee on the results of the administrator interviews and focus group in Windsor. • Robb also facilitated a discussion around possible themes and promotional incentives that could be used as part of an intervention strategy with single mothers. 	July 8, 2002

TASK	DETAILS	DATE COMPLETED
Literature review	<ul style="list-style-type: none"> • We completed the first draft of the literature review and submitted it to the reference committee 	August 23
Securing of LBS program as pilot site	<ul style="list-style-type: none"> • Discussions continued with several LBS programs to try to secure a pilot site • One of the key issues was the limited availability of on-site childcare 	(ongoing)
Reference committee meeting	<ul style="list-style-type: none"> • A reference committee meeting was held on September 24 in Chatham • Among the items discussed were: <ul style="list-style-type: none"> ○ Highlights and applications of the literature review ○ Confirmation of single mothers as target market ○ Possible messages and incentive pieces to use ○ Involvement of a single mother from an LBS program as an outreach spokesperson ○ Application of tracking tool ○ Revision of intervention timelines 	September 24
Non-LBS focus group	<ul style="list-style-type: none"> • Robb facilitated a focus group with single mothers from the Lochiel Drop-in Centre in Sarnia. • As part of the focus group, we tested assumptions about motivations and barriers to participation, promotional pieces, and possible messages. 	October 2
Securing of spokesperson for community presentations	<ul style="list-style-type: none"> • Through the efforts of Jean Doull, Executive Director of the Organization for Literacy in Lambton, two women were identified and a meeting was scheduled for early November with these women and Jean in Sarnia. 	October 25

TASK	DETAILS	DATE COMPLETED
Design of fridge magnet	<ul style="list-style-type: none"> • The results of the research, and particularly the non-LBS focus group, indicated that fridge magnets would be an ideal promotional piece to accompany this outreach project. • Using the results of the research, we began designing an image and message for a double-sided fridge magnet. However, by the end of the month we had not found a manufacturer of two-sided magnets. 	October 31
Meeting with potential spokespersons	<ul style="list-style-type: none"> • Robb and Jean Doull met with the two women from Sarnia who had expressed an interest in being spokespersons for the EOSE project. • As part of that meeting, the women indicated what roles they would be comfortable with, how much time they could devote and the types of messages that would need to be delivered as part of the presentations. 	November 7
Design of fridge magnet and postcard	<ul style="list-style-type: none"> • A decision was also made to proceed with a postcard, in addition to the fridge magnet because we could not find a manufacturer of two-sided printable magnets. Initial designs and wording were submitted to the reference committee on December 3 and final versions of the postcard and fridge magnet were forwarded to the Clear Design Centre for production. 	December 28

TASK	DETAILS	DATE COMPLETED
<p>Scheduling and facilitation of community presentations</p>	<ul style="list-style-type: none"> • In addition to the one presentation with single mothers through the Lochiel Drop-In Centre, two additional sessions were booked: one with the YMCA's LEAP program and one through the local Health Unit. • An anticipated session with the Early Years program was not realized; however, it was agreed that a future joint session was possible. • By the end of the month, two sessions had been completed, one by each of the spokespeople. Jean Doull attended and led both sessions, while Robb attended the second. • In total, approximately 25 single mothers attended these two sessions. • Postcards and fridge magnets were distributed to participants from both sessions. 	<p>January 31</p>
<p>Design of radio ad to complement presentations</p>	<ul style="list-style-type: none"> • Robb, Andrea and Jean worked together to develop a radio ad that was to be aired on three stations over the course of three weeks (January 24 to February 14). Vicky Ducharme, Executive Director of the Sarnia-Lambton Training Board, was instrumental in working with the radio stations to develop and schedule the ads. 	<p>January 23</p>

Appendix H – Glossary of terms

EOSE – Evaluating Outreach Strategies and Events

IALS – International Adult Literacy Survey

LBS – Literacy and Basic Skills

LEAP – Learning, Earning and Parenting

OLC – Ontario Literacy Coalition

OLL – Organization for Literacy in Lambton

TLCN – Tri-County Literacy Network