

CBPM Policy Development was created to give coalitions a systematic planning framework for selecting, translating and tailoring evidence-based policies for local adoption. Like its Program Development predecessor, CBPM for Policy relies on community development and social marketing principles. It also teaches coalitions to use public health advocacy tools to promote policy change at the organizational, local community, and state levels.

CBPM Policy Development is divided into eight steps—(1) *create a foundation for success*; (2) *review policy options*; (3) *select a policy to promote*; (4) *identify priority audiences among beneficiaries, stakeholders, and decision-makers*; (5) *conduct formative research with priority audiences*; (6) *develop a marketing plan for promoting the policy*; (7) *develop and implement a plan to monitor policy implementation and evaluate impact*; and (8) *advocate for policy adoption*. This following is a brief overview of the eight steps of the framework.

Step 1: *How can we create the foundation for success?* The initial step is designed to help the coalition understand the CBPM Policy Development process and the resources needed to implement it well. To this end, the coalition is given an overview of the process and a “readiness checklist” to identify additional members it will need, such as access to marketing expertise and research skills. This Web-based training program includes extensive support materials to provide coalitions that are just forming with guidance and resources to aid this process, as well as to engage in problem definition and selection.

Step 2: *What should we change?* In this step, the coalition reviews relevant evidence-based prevention policies and eliminates policies it is unwilling or unable to promote. The goal is to winnow the policy options to ≤ 10 , enabling more thorough analysis in the next step.

Step 3: Which policy or policies should we promote? Marketing’s concept of “return on investment” is used to help the coalition select one or possibly two policies to promote. The coalition relies on the evidence base assembled on each policy, along with the prior experiences of its members and their knowledge of the community, to weigh its health outcomes or impact with the political and logistic feasibility of enacting it in a timely way. This information is used to estimate each policy options’ social impact (i.e., obesity risk reduction potential) and likelihood of adoption by key stakeholders coalition members then compare the ROI assessments for each policy and select one or more that will give them the optimal balance of impact and likelihood of adoption.

Step 4: Which audiences should we give our greatest priority in building support for policy change? In this step, the coalition identifies groups and individuals that will be directly affected by the policy (*beneficiaries*), have a stake in its outcome (*stakeholders*), or decide if it is enacted (*policy makers*). If needed, the concept of “return on investment” is used to select specific segments within each of these audiences to give greatest priority in developing a marketing plan for policy change.

Step 5: How can we build common ground and gain audience support? With priority segments in mind, the coalition conducts research, or “listening sessions”, to gain an understanding of how beneficiaries, stakeholders, and policy makers view the policy issue. Some coalition members also are trained to collect data alongside of researchers. The goal of this step is to obtain the information needed to modify the policy to optimize support from each audience group. Results from this step play a critical role in developing a marketing plan to guide advocacy activities in step 6.

Step 6: *How can we make it happen?* With guidance from members or consultants with marketing expertise, the coalition uses research findings for each priority audience to make the marketing decisions that comprise an integrated strategic plan. Components of a marketing plan for promoting policy changes include: (1) policy goals (the actual product); (2) policy targets (priority segments); (3) target values and concerns to be addressed (core product); (4) a causal model (price and other influential factors); (5) an advocacy frame (positioning strategy); (6) allies to mobilize (partners); (7) opponents to disarm (competition); (8) advocacy tactics (promotion); and (9) measures of success.

Step 7: *How can we tell if it is working?* As part of the marketing plan, the coalition develops an evaluation plan to use in monitoring progress, identifying the need for mid-course activities to ensure fidelity with the original policy goals, and assessing policy impact.

Step 8: *Are we implementing as planned?* Finally, the marketing plan serves as a blueprint for the coalition's advocacy activities. Coalition members' roles may vary widely, with some people lobbying policy makers, others op-ed articles, letters to the editor, and policy briefs or organizing media advocacy activities. A chairperson or subcommittee helps members communicate with others about successes (e.g., media coverage, sponsorship by key stakeholders) and obstacles that must be overcome so advocacy strategies are adjusted to fit the changing political scene.

Conclusion

The CBPM Policy Development combines elements from community engagement, social marketing, and policy advocacy principles and techniques into a framework that assists coalitions in selecting, modifying, and implementing policies. The framework and training

materials are designed to assist the needs of diverse coalitions addressing a wide array of public health issues.

This Web-based training site is available to help coalitions and their research partners to identify the resources needed to use CBPM Policy Development, and when ready, to obtain training in each of the eight steps in the CBPM Policy Development process. Social marketers and marketing researchers may use the site to train coalition members and guide them as they apply CBPM Policy Development's core marketing principles (e.g., data-based decision making, use of the return on investment concept to select policy initiatives, and formative research with policy makers, issue experts, and other stakeholders) to develop an integrated marketing plan for promoting policy change.