

Partnering to Promote Quitlines

A plan to coordinate the effective use of 1.800.QUIT.NOW in national media and considerations for other promotional strategies



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► Introduction

Quitlines are telephone-based tobacco cessation services that help tobacco users quit through a variety of services, including counseling, medications, information and self-help materials. Quitline effectiveness is documented by numerous research studies.¹ To contribute to an overall reduction in tobacco use, the quitline community recognizes the need to increase the number of tobacco users who use quitline services (i.e. expand reach). In the U.S., quitlines reach about 1% of the country's 46 million smokers each year.² Researchers estimate with adequate funding and promotional activities, quitlines could reach 16% of the smokers annually.³ Over the past few years, many quitline funders, service providers and national organizations have initiated promotion efforts to expand quitline reach using media and non-media approaches.

The formation of the National Network of Tobacco Cessation Quitlines in 2004 and subsequent launch in November of that year of 1-800-QUIT-NOW – a national toll-free number supported by the Cancer Information Service at the National Institutes of Health that routes callers to the respective state quitlines – greatly advanced quitline promotional efforts. Through the toll-free number, all U.S. tobacco users have access to their state's free quitline cessation services. National organizations and media need only include one number when providing information to the public or writing stories about tobacco-use cessation.

A variety of strategies such as paid and earned media, distribution of free or reduced-cost nicotine replacement therapy (NRT), policy changes and/or healthcare provider referrals are used at the state level to promote quitline use. When these strategies are national in scope, such as media promotion of 1-800-QUIT-NOW, they have the potential to increase the number of tobacco users reached and counseled throughout North America.

Through the toll-free number, all U.S. tobacco users have access to their state's free quitline cessation services.

While beneficial for expanding reach, increases in call volume may significantly impact quitlines' abilities to provide services to all callers as most quitlines operate on limited budgets. When increases in call volume occur, quitlines may not have the financial resources to respond to all callers, have to modify services to accommodate calls or temporarily cease operations to stay within the quitline budget. Coordinating with governmental, non-governmental organizations (NGOs) and commercial organizations interested in promoting quitlines at a national level presents an important opportunity to build on previous work and expand reach at a national level.

As part of a Robert Wood Johnson Foundation (RWJF) grant to strengthen the linkages of quitlines and other tobacco control policy efforts, The North American Quitline Consortium (NAQC), its Advisory Council, members and national partners created *Partnering to Promote Quitlines: A Plan to Coordinate the Effective use of 1-800-QUIT-NOW in National Media and Considerations for Other Promotional Strategies* (Plan) to serve as a guideline for national media promotions of 1-800-QUIT-NOW. The Plan recommends an approach and action steps for enhanced coordination to serve the interests and address concerns of quitlines and national organizations. Past experiences and lessons learned from the states as

well as national efforts to promote 1-800-QUIT-NOW serve as the basis for the recommended approaches and actions steps described in the Plan, which includes the following three main sections:

- **Section I: Background** – This section outlines findings from past promotions, results from a survey of NAQC members and NAQC’s previous work related to quitline promotions efforts. Also included are descriptions of key U.S. organizational stakeholders and a set of guiding assumptions under which national promotions should operate.
- **Section II: Short-Term Coordination** – This section includes a recommended approach and action steps for coordinating national promotions of 1-800-QUIT-NOW. The key action steps are divided into planning, implementation and information gathering with ongoing feedback. In the planning phase, the process includes developing a set of standards for national promotions of 1-800-QUIT-NOW, determining the information needed to prepare for national promotions, identifying data needed to determine impact and preparing for challenges. Implementation includes strategies to assist quitlines and promoters with sharing and processing information and data related to promotional activities. Finally, the need for periodic review of national promotions, the call volumes generated and lessons learned are suggested to assist with future national promotion efforts.
- **Section III: Long-Term Coordination** – This section offers suggestions for evaluation of the plan, long-term coordination and future needs. Next steps and future directions identified by NAQC members and partners are reflected here, including the need to develop a better understanding of the impact and effectiveness of national promotions and a long-term strategy to actively promote quitlines nationally. In any effort to promote 1-800-QUIT-NOW nationally, funding for quitline operations and technical assistance must be addressed. With continued collaboration, information and data sharing and meaningful communication, national quitline promotions can increase the number of tobacco users who successfully quit tobacco through use of North American quitlines.

► Summary & Next Steps

Disseminating this plan to the quitline community and interested national organizations is the next step in coordinating national quitline promotions. The full implementation of short- and long-term steps in this plan will depend on funding and commitment to move the work forward. As funding permits, NAQC will continue to assume the role of facilitator on this issue, working collaboratively with the quitline community and key partners.

References

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- 2 SE Cummins, L Bailey, S Campbell, C Koon-Kirby, SH Zhu. “Tobacco Cessation Quitlines in North America: a Descriptive Study.” *Tobacco Control* 2007; 16 (Suppl I): i9-i15.
- 3 Fiore, Michael C. Preventing 3 Million Deaths Helping 5 Million Smokers Quit: A National Action Plan for Tobacco Cessation. Interagency Committee on Smoking and Health. Subcommittee on Cessation. Feb. 13, 2003.

The North American Quitline Consortium (NAQC), its Advisory Council, members and national partners created this plan to serve as a guideline for national media promotions of 1-800-QUIT-NOW. The plan presents a recommended approach and action steps for enhanced coordination to serve the interests and address concerns of both quitlines and national organizations. Although NAQC's Promotion Task Force* and members have identified many important strategies for promoting quitlines, this plan focuses on national media. The proposed action steps are intended to capture the opportunities national media present and to address the potential challenges such as surges in the number of calls to quitlines that media might generate. The plan is based on the need for collaboration, information and data sharing as well as striking a balance between national and state needs with meaningful communication at its core.

*NAQC's role in national
quitline promotions
is to facilitate information
sharing, coordination
and communication.*

NAQC's role in national quitline promotions is to facilitate information sharing, coordination and communication. In its current capacity, NAQC does not conduct national promotions of 1-800-QUIT-NOW, but does represent the diverse community of quitlines and the need for effective, manageable promotions. NAQC offers the following plan to the quitline community and national organizations interested in quitline promotions as recommended next steps and future work on the issue. Implementation will depend on future funding.

This plan has three main sections:

- **Section I** – This section outlines the issue and provides history, defines roles and describes a set of guiding assumptions under which national promotions should operate.
- **Section II** – This section includes a recommended approach and action steps for coordination.
- **Section III** – This section offers suggestions for evaluation of the plan, long-term coordination and future needs.

* To better understand promotion and create a collaborative approach to promotion efforts, NAQC formed the Promotion Task Force (PTF). This group met from 2005 through 2007 to capture knowledge, evidence and expertise about quitline promotion in Canada and the U.S. Members of the PTF included American and Canadian quitline service providers, researchers and promotions experts; representatives from the state, provincial and federal funding organizations; and national and community organizations.

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Section 1: Background

► The Issue

NAQC is an independent non-profit organization that promotes evidence-based quitline services across diverse communities in North America (www.NAQuitline.org). NAQC and its members strive to help tobacco users quit by providing access to high quality and effective telephone and Web-based services. The quitline community has grown significantly since NAQC was formed in 2004. Now, all 50 states, the District of Columbia, Puerto Rico, Guam, American Samoa, the Federated States of Micronesia and the Northern Mariana Islands, all 10 Canadian Provinces and Mexico have telephone counseling programs to help tobacco users quit.

In the U.S., most states pay for and operate quitline services with minimal federal funding. The relative importance of federal funding to each quitline's budget varies from a small percentage of the quitline's operating budget to nearly 100%. Funding is tied to states' budget cycles and varies greatly across the country. Overall, 2006 U.S. quitline service budgets ranged from \$58,000 to \$4.6 million with a median of \$515,000. Median per capita funding for counseling services in 2006 was \$0.15 while services per adult smoker were funded at \$1.01.¹ In its October 2007 *Best Practices for Comprehensive Tobacco Control Programs*, the Centers for Disease Control and Prevention (CDC) recommended a minimum budget of \$2 per smoker and a maximum of \$43.25 per smoker to serve 6% of a state's tobacco users per year. This recommendation translates into a minimum overall budget for cessation interventions in the U.S. of \$611.2 million and a maximum of just under \$1.6 billion with each state's recommendation depending on factors such as overall population, smoking prevalence, proportion of citizens who are uninsured or enrolled in publicly financed programs, etc.²

The quitline funding model contributes to fluctuations in quitline capacity from year to year and from state to state. In addition, state quitlines have been in operation anywhere from one to 15 years contributing to varied levels of experience and stability and mixed support from lawmakers and the public.

Quitlines are an effective population-based strategy that can help increase tobacco users' attempts to quit. To have an even greater impact on reducing tobacco use, the quitline community recognizes the need to increase the number of tobacco users who use quitline services (i.e. expand reach). Over the past few years, many quitline funders, service providers and national organizations have successfully initiated efforts to accomplish this objective. Both media and non-media approaches have been important for expanding reach. Coordinating with governmental, non-governmental organizations (NGOs) and commercial organizations interested in promoting quitlines at a national level presents an important opportunity to build on previous work and expand reach at a national level.

Quitlines are an effective population-based strategy that can help increase tobacco users' attempts to quit. Over the past few years, many quitline funders, service providers and national organizations have successfully initiated efforts to accomplish this objective.

A variety of strategies such as paid and earned media, distribution of free or reduced-cost nicotine replacement therapy (NRT), policy changes and/or healthcare provider referrals are used at the state and provincial levels to promote the use of quitlines. When these strategies are more national in scope, such as media promotion of the 1-800-QUIT-NOW number*, they have great potential to increase the number of tobacco users reached and counseled for tobacco use cessation throughout North America. While beneficial for expanding reach, these increases in call volume may have a significant impact on quitlines' abilities to provide services to all callers. Quitlines often operate on limited budgets and may not have the financial resources to respond to all callers, have to modify services to accommodate calls or temporarily cease operations to stay within the quitline budget.

Past experience with national promotions of the 1-800-QUIT-NOW number demonstrate the potential impact on calls to quitlines. In November 2005, ABC promoted the toll-free number in its series "Quit to Live: Fighting Lung Cancer." Although there were regional variations, the number of calls to 1-800-QUIT-NOW increased significantly – on average, 67% from October 2005 to November 2005.³ Because these calls were transferred to the states, which have a range of budgets, services offered, service hours and staff capacity, the impact of the increased demand varied from quitline to quitline. In fact, when faced with the potential of depleting their small budgets due to this promotion, six states considered disconnecting from the national access number. Overflow calls from two of these states were handled during the promotion by a collaboration of the American Cancer Society (ACS) and the American Legacy Foundation (Legacy) quitlines.

In November 2007, NBC's *Today Show* and the CSNBC Web site included mentions of the 1-800-QUIT-NOW number generating a significant number of calls in a very short time. In California, this national promotion generated approximately a four-fold increase in calls compared to a comparable day with no national promotion. This increase presented challenges given the quitline did not know about the promotion and therefore did not have enough staff available to answer the number of calls generated.⁴ Across the states served by Free & Clear, Inc., this national promotion generated an average six-fold increase in calls compared to an average day with no national promotion. If the service provider had received advanced notice of the promotion, staffing adjustments would have been made to ensure all the calls generated were answered.⁵ While this increase was not sustained, it provides additional evidence of the impact national promotions can have on state-level call volumes.

When surveyed in 2007 regarding concerns about national quitline promotions, NAQC members** indicated a range in ability to handle an increase in intake calls in any given month. In fact, nearly 18% of those who responded indicated their quitline budget could handle no more than a 5% increase in calls per month while another 18% could handle no more than a 20% increase per month. For quitlines that receive 500 or fewer calls per month, this could mean that even 25 to 100 extra calls per month could be a concern and perhaps result in service interruptions, customer dissatisfaction and/or budgetary issues.

* 1-800-QUIT-NOW is a national toll-free number that links callers with the quitline in their state (based on area code of the call). The number is supported by the Cancer Information Service at the National Institutes of Health, US DHHS, and was launched in November 2004.

** N=45 representing 40 states and provinces.

For all quitlines – regardless of size or budget – an increase in calls resulting from national promotions can pose a problem if:

- Funders and service providers are unaware of the timing of these promotions or earned media.
- The advanced notice and information provided about a national promotion does not help quitlines estimate how many calls will be generated.
- The quitline is not open when the calls occur.
- State-level promotions resulting in higher call volumes occur at the same time.
- The budget cycle is nearing its end.
- Additional services such as NRT or extra counseling calls are being offered by a state quitline amplifying the increased service costs.

In general, concerns about national promotions expressed by quitlines and service providers fall into the following categories:

- Receiving enough notification before promotions to allow service providers adequate time to adjust staff schedules, budgets or state-level promotions, if needed.
- The potential for negative impact on customer service, which can be related to abandoned calls due to overload on the phone lines or inadequate staff to answer calls; inability to maintain effective intervention protocols in the event call times need to be shortened; inability to deliver what is promised in the national ads if this is substantially different from a quitline’s standard service; inability to return calls received as a result of promotions run outside normal service delivery hours; and inability to connect with callers in a timely manner to support their desire to quit.
- Ad content that does not fit state or provincial culture, a quitline’s approach to promoting cessation or content that conflicts with the quitline’s branding strategy.
- Increased call volumes beyond financial capacity (e.g. receiving more calls than the budget will allow), receiving too many calls in a short period of time or the inability to handle sustained call volume increases.
- Lack of coordination with state-run promotional campaigns, quitline hours and staffing capacity.
- Potential political consequences such as inadvertently sending a message to decision makers that there is a nationally-funded quitline or that state quitlines are funded by national partners. This type of misconception could adversely impact political support for state-funded quitline services and/or promotions or private partner contributions to cessation efforts.

For all quitlines – regardless of size or budget – an increase in calls resulting from national promotions can pose a problem.

The number of U.S. quitlines, their diverse services and priorities and varied resources present challenges to organizations seeking to promote 1-800-QUIT-NOW on a national level. These national organizations have identified challenges associated with how to best collaborate with quitlines to address the mutual goal of reducing tobacco use including:

- Maintaining an ongoing dialogue.
- Clarifying confusion, concerns and misperceptions about promotions.
- Providing advanced notification of earned media due to sometimes minimal notification from media contacts and limited control over timing.
- Identifying strategies for compromise (e.g. negotiation and flexibility).
- Avoiding duplication in promotion.
- Reaching a common understanding with quitlines about potential solutions.

Past experience and current knowledge about quitline operations can help address the concerns of both quitlines and promoters with a thoughtful, coordinated approach. NAQC members have explored the opportunities, benefits and challenges presented by national quitline promotions and have identified solutions and next steps for enhanced coordination. To successfully promote 1-800-QUIT-NOW and quitlines nationally, NAQC's work will need to be complemented by enhanced collaboration with current partners and engagement of new partners.

Past experience and current knowledge about quitline operations can help address the concerns of both quitlines and promoters with a thoughtful, coordinated approach.

► Robert Wood Johnson Foundation Grant

To build on previous work completed by NAQC's Promotion Task Force (described below) and to begin addressing the opportunities and challenges identified, NAQC launched the project, Building Consensus: National Quitline Promotions in January 2007. This project, made possible through a two-year grant from the Robert Wood Johnson Foundation (RWJF), allows the U.S. quitline community to work with national organizations such as the American Legacy Foundation on a plan to move forward with promoting 1-800-QUIT-NOW in national media. Although the project's focus is currently on promotions in the U.S., Canadian quitlines can benefit from the strategies and plans described below if they also launch a nationwide access number.

The objectives of this project include the following:

- Assess the impact of national promotions of 1-800-QUIT-NOW on the call volume and service delivery success of quitlines.
- Identify opportunities to coordinate and influence national promotional efforts.
- Identify options for managing the potential "surge" in call volume.
- Develop consensus on the best option for moving forward.
- Begin working on implementation.

To accomplish these objectives, NAQC facilitated the following activities in 2007:

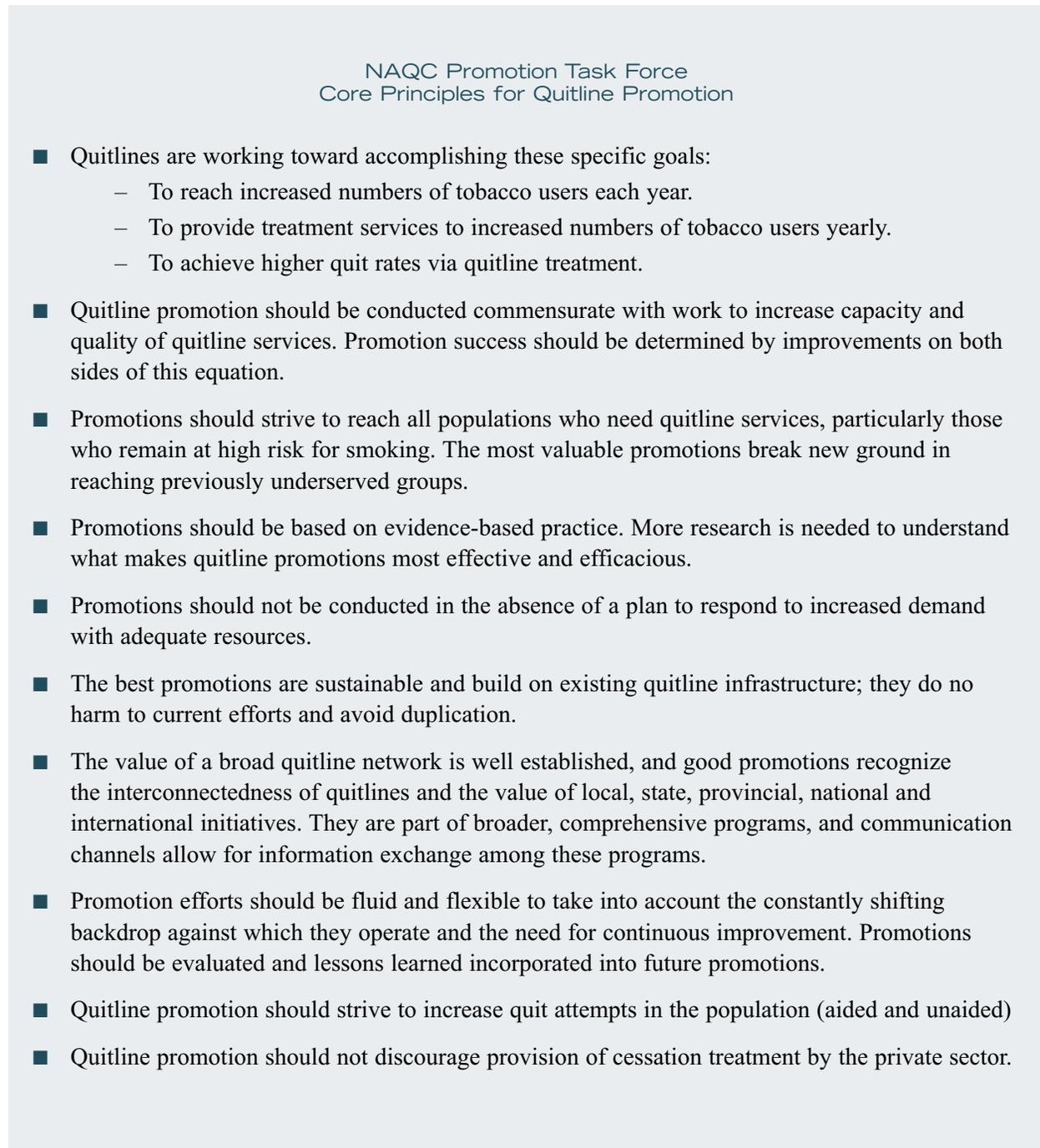
- Conducted key informant interviews to gather information from NAQC members to better understand: a) perceived benefits from national promotions; b) scope of concerns about national promotions; c) anticipated impact on quitline operations (volumes and service delivery); d) what quitlines would need to handle national promotions; e) preferences for options to address concerns; f) coordination ideas; and g) communication ideas.
- Convened a NAQC Advisory Council conference call focused on providing background on the project and a summary of the key informant interviews and gathering input on how to collect member feedback and input on options to consider. A summary of the call is available at NAQC's Web site (www.naquitline.org).
- Conducted an online survey to gather information and feedback from NAQC members on the key issues surrounding national quitline promotions.
- Held a work group meeting with Advisory Council and national partners to develop a clearer understanding of the opportunities, benefits and challenges national promotions present for quitlines. Participants discussed options for coordinating the response to national promotions and addressing concerns (e.g. call surges and additional resources for service delivery). A full meeting summary is available on NAQC's Web site (www.naquitline.org).
- Conducted a plenary session and break-out discussion at the NAQC Annual Meeting to provide an overview of NAQC's work on quitline promotions and the proposed coordination plan. Member feedback was gathered through a facilitated discussion and members were informed of next steps and the process for submitting feedback. The plenary presentation and handouts developed for these sessions are available on NAQC's Web site (www.naquitline.org).
- Conducted member conference calls to gather feedback on communication strategies, information and data sharing and proactive solutions for handling call surges. Information gathered during these calls is reflected in this Plan.
- Compiled information and feedback into this Plan for distribution to NAQC members and national partners for implementation, where possible, and as a guide for future work on this issue.

► NAQC Promotion Task Force

Prior to the RWJF-funded project, the NAQC Promotion Task Force (PTF) was established in 2005 to develop a communication protocol to foster information exchange and deliver necessary and timely information on upcoming promotions to appropriate constituents. From 2005 through 2007, the Task Force worked to fulfill these objectives. The PTF also developed a set of Core Principles on Promotion (see figure 1, next page), a report synthesizing current knowledge about the promotion of quitlines and action-oriented recommendations to NAQC. A summary of the PTF initiatives and supporting documentation can be found in the PTF final report on NAQC's Web site (www.naquitline.org).

This plan incorporates much of the work completed by the PTF. The Core Principles provide a solid foundation and guidance for shaping the proposed approach. The communication protocol (described in Section II) has been implemented to inform members about national promotions.

Figure 1: Core Principles for Quitline Promotion



► Defining Roles

As mentioned, quitlines are funded and operated by each state with some federal funding. In addition to providing counseling services, some states fund promotional efforts ranging from paid media to healthcare provider outreach. Although the CDC recommends a dollar-for-dollar ratio in the budgets for promotions and operations, the 2006 NAQC survey found promotional budgets range from zero to \$6.5 million with a median of \$167,500, illustrating the limitations some states have on promoting quitline services.^{6,2} It is important to note public relations and resulting earned media coverage generated in many states contribute greatly to state-level promotional efforts.

The formation of the National Network of Tobacco Cessation Quitlines in 2004 and subsequent launch of the 1-800-QUIT-NOW portal number greatly advanced quitline promotional efforts. Through the toll-free number, all U.S. tobacco users have access to free cessation services in their states. National organizations and media need only include one phone number when providing information to the public or writing stories about tobacco-use cessation. Furthermore, 1-800-QUIT-NOW can be promoted by any entity without permission as it is in the public domain having been developed by the U.S. Department of Health and Human Services (US DHHS).

With the successful launch of 1-800-QUIT-NOW number and generally positive feedback from states, the question remains how best to promote the cessation services offered by state-based quitlines using this number to ultimately increase the number of tobacco users helped by evidence-based cessation treatments. The key U.S. organizational stakeholders with an interest in this effort include:

- **NAQC** is a membership organization representing the diverse community of quitlines across North America. Members include quitline funders, service providers, administrators, researchers and evaluators and representatives of national organizations. NAQC is interested in facilitating coordination of national promotions to increase quitline usage with minimal harm to the existing quitline infrastructure. NAQC is also very interested in developing a meaningful way to assess the potential impact of national promotions and understand effectiveness through data sharing and analysis. The organization's primary role in national promotions is as a facilitator. NAQC can provide a neutral voice by bringing together key players to facilitate information sharing, coordination and communication.
- **Quitline funders** include the states, provinces and, in 14 cases, state-level foundations. Most states fund and operate a quitline with state and some federal money. Funders select service providers, negotiate and manage contracts with them, evaluate services and promote quitlines to fit state goals. Each state determines the counseling (i.e. operational) and promotional budgets, type and level of counseling services, eligibility criteria and goals for the quitline. Together with the service provider, funders can provide promoters with input and feedback on national promotion plans; oversee and monitor impact on the quitline; share experiences and data on past, current and future promotions and determine how to adjust budgets and services offered to callers to respond most appropriately to a national promotion. Ultimately, funders will determine if they have the financial capacity to respond to calls generated by a national promotion of 1-800-QUIT-NOW.

- **Service Providers** provide the counseling and related services (e.g. technology, NRT in some cases, evaluation and reporting) for single or multiple states. Some providers also manage quitline promotional efforts depending on the terms of the contract. They may be based in universities, voluntary agencies and medical centers. Some are separate non-profit or for-profit entities. They manage service delivery, day-to-day operations and in some cases, contracts with states or other clients (e.g. employers, health plans). Their primary role related to national promotions is to provide counseling services to callers who respond to promotions in compliance with each contract. They can provide valuable, timely data about the immediate impact of a promotion and offer guidance to the states on preparation for and response to the calls generated. Service providers can share historical data on different types of promotions to assist in the development of future campaigns.
- **National Promoters** include national organizations with a mission to reduce the harm caused by tobacco, healthcare professional organizations and federal agencies. In the context of this project, the promoter's primary role is to develop media and other promotional strategies to promote tobacco cessation, including promotion of 1-800-QUIT-NOW. Ideally, these promoters would be responsible for planning and executing the media buys required for the promotion. Because of the potential impact of national promotions on funders and service providers, promoters can contribute to communication and coordination efforts by sharing information before, during and after running a campaign. They can also collaborate to identify a set of mutually beneficial standards for national promotions.
- **Federal Agencies** provide funding to states for quitline services through the CDC and provide the infrastructure to support and maintain the 1-800-QUIT-NOW portal number and related technology through the Cancer Information Service (CIS) at the National Institutes of Health (NIH). A variety of other agencies at the US DHHS, including NIH, provide funding for quitline research. The primary role of federal agencies is to support and promote quitlines as part of the national agenda on tobacco control. These agencies can play an important leadership role by continuing or even increasing their financial support for quitline services and research and ensuring the long-term viability of the national network of tobacco cessation quitlines. These agencies are important to the collaboration given the contacts they have with national media and the likelihood promoters will continue to contact them regarding tobacco cessation and use of 1-800-QUIT-NOW.

► Guiding Assumptions

The following assumptions were developed based on information gathered from NAQC members, promoters and Advisory Council members. These assumptions provide a set of conditions under which national promotions should operate. They represent a shared understanding of the issues and current realities of promoting quitlines with different goals, budgets, capacities and target populations.

- Ongoing national promotions of 1-800-QUIT-NOW are valuable as they can help achieve common goals of increasing public awareness of quitlines and/or the number of tobacco users reached for counseling services, thereby decreasing the toll of tobacco on health as more tobacco users quit.

- Quitlines may not have the budget and/or capacity to handle call increases that result from national promotions due to insufficient funding, limited budgets or fluctuations that occur during a state's budget cycle. Funding for the delivery of quitline services may present a constant challenge for some states requiring financial assistance from either the state or other sources to continue operations.
- Gradual increases in call volumes are more manageable and generally result in higher quality services than call volume surges. Generating a volume of calls that quitlines can sustain long-term is important for quitline management.
- The current funding model is such that states operate and pay for quitline services. Given this, quitlines will continue to tailor services and the marketing of these services to meet the unique needs of their states' populations.
- Funding for state-level promotions varies significantly in many states and can fluctuate annually. Despite this, the majority of states are motivated to continue planning and executing promotions to reach target populations and otherwise fit specific needs.
- In some instances, national media can be purchased more cost-effectively and efficiently than regional or state-by-state media.
- Addressing the unique needs of every quitline while maintaining the efficiencies of a national effort, present logistic and economic challenges for national promotions.
- Compromising and finding a workable balance between national and state needs related to promoting quitline services is necessary for national promotions to be successful.
- Knowing the details of media buys and earned media opportunities in advance is valuable for quitlines, but the amount of notice and level of detail provided can be limited by factors beyond promoters' control.* These factors can influence promoters' ability to respond to information requests from funders and service providers, which would assist with short- and long-term planning.

* Some examples include: ABC's decision to promote 1-800-QUIT-NOW for a month-long series in November 2005; An extension to an original media buy (i.e. extra weeks or months or additional exposure) due to positive response or additional funding; Uncertainties surrounding earned media pitches; The often fast-paced nature of the national media environment; Proprietary issues related to the media buyer.

Section 2: Short-Term Coordination

► Introduction

The action steps presented below are based on the above guiding assumptions and the need for coordination and communication. The steps also address the concerns and challenges identified by NAQC members and national promoters. Woven throughout is the need to develop ways to better understand the potential impact and effectiveness of national promotions.

► Coordination Phases

- **Planning** – To prepare NAQC and its members for ongoing national quitline promotions, action steps are being proposed to develop a coordinated approach. These initial steps are focused on the preliminary planning NAQC can initiate before working with specific promoters. Many of these have been discussed with NAQC members and partners and the ideas generated are presented below.

Every effort will be made to identify potential challenges and identify solutions prior to the implementation of a national promotion, but in the event an unanticipated problem occurs such as generating more calls than quitlines can handle (i.e. surges), action steps are being proposed. These steps should contribute to an effective, feasible response particularly related to potential call surges.

- **Implementation** – Just prior to the launch of a national promotion and during the campaign, the proposed strategies can be implemented to assist quitlines and promoters in sharing and processing information and data to plan for the launch or make changes if possible.
- **Information Gathering and Ongoing Feedback** – Periodic review and evaluation of national promotions, the call volumes generated and lessons learned can help inform future efforts to promote quitlines nationally. All stakeholders have repeatedly expressed a need for quitline and media data to help understand the impact and effectiveness of using 1-800-QUIT-NOW in national media. This common need and desire offers an opportunity to collaborate in order to advance our understanding of how to best implement national promotions.

► Action Steps by Phase

Planning – The proposed steps for this phase of the process include the following: a) Develop a set of standards for national promotions of 1-800-QUIT-NOW; b) Determine information needed to help prepare for national quitline promotions; c) Identify quitline data needed to determine impact; and d) Prepare for challenges.

- **Develop a set of standards for national promotions of the 1-800-QUIT-NOW number.** These standards offer a set of guidelines for planning national promotions and media buys. They answer the questions below, which are related to the concerns and challenges presented by national quitline promotions. When reviewing these standards, it is important

to acknowledge earned media present a unique set of challenges given limited control over when and where stories run and uncertainties about exact timing. Additional collaboration and discussion with national promoters is needed to reach consensus on these standards and the best way to implement them to fit a promoter's goals and quitline needs.

1. *What time of year are national promotions needed?*

The second and third quarters of the year are generally the slowest times for quitline call volumes. Running national promotions during the months of April through September could help increase calls to quitlines. Developing a fuller understanding regarding the cost-effectiveness of promoting quitlines during the summer months is important for this standard as is tracking the results of national promotions.

2. *During what times of day should national ads run?*

National promoters should attempt to run television ads, which tend to generate the highest call volumes, during core hours of operation when quitlines are well staffed or can pull in additional staff as needed. Minimizing the need to activate voice mail systems is preferred given the customer service and staffing challenges presented by returning messages. Tobacco users are difficult to reach and the opportunity to assist them can be lost if staff are not available to answer calls. Quitlines and promoters should identify a media schedule that will accommodate most quitlines and take the different time zones into consideration. Acknowledging the best time of day can also depend on the intended demographic reach for a promotion, the type of media used (e.g. radio or television) and the promoted message. The best times to reach certain audiences may conflict with the operational hours of some quitlines. The *Quitline Hours of Operation* available on NAQC's Web site (www.naquitline.org) can be used as a reference for this standard.

3. *How often will the ads run?*

Agreeing to a reasonable frequency that allows quitlines to handle calls with minimal negative impact on customer service (e.g. long wait times, lost calls and busy signals) is critical. Promoters should consider beginning with a "pilot test" (e.g. three-week buy, regional rollout) to establish the potential impact and inform decisions at the state and national levels. This standard may differ depending on the type of media used.

4. *What is the best rollout strategy for national promotions?*

The preferred approach is to gradually introduce ads by region or in short blocks of time (e.g. three weeks) to prevent overwhelming the entire, national quitline system at once. Timing and frequency decisions (items 2 and 3 above) could alleviate the need for a gradual roll out. A regional approach could also allow the quitline network to gradually gauge a promotion's impact before a national rollout.

5. *How much notice will quitlines receive before the launch of a national promotion?*

The minimum recommended notice is 30 days, but the ideal would be 90 days or more. Some quitlines would benefit from even more notice so they can adjust state

promotion plans, which are sometimes planned six months to a year in advance. The level of detail available to share with quitlines may vary, but quitlines benefit from any information no matter how minimal. Additional information can always be disseminated as it becomes available. As previously mentioned, earned media can present unique challenges to providing advanced notice given the nature of generating these stories.

6. *Will 1-800-QUIT-NOW be promoted in the ads?*

The preference is that the existing toll-free number (1-800-QUIT-NOW) be used rather than another number to provide consistency, avoid confusion and continue the benefits of the existing infrastructure supported by NCI. This system currently connects callers to the appropriate state quitline with one easy phone number.

7. *What “service” should be promoted in the national campaign?*

States vary in what services and products they offer. Some provide NRT with limited counseling. Others provide counseling with limited NRT. Many have eligibility criteria due to budget constraints or priorities. Working with quitline representatives to identify “universal” language that describes services offered by all quitlines and promotes the idea of cessation would best serve quitlines and help avoid confusion.

8. *Will the planned promotion conflict with any other major national efforts or large-scale state-level promotions?*

Quitlines could have trouble responding to calls generated from multiple national promotion campaigns. In addition, some states begin planning promotions a year in advance. Minimally, both promoters and quitlines should exchange information about their campaigns, work to identify potential conflicts and develop contingency plans if necessary.

■ **Determine Information Needed to Help Prepare for National Quitline Promotions.**

The following list represents a compilation of the details quitlines have requested before a national promotion occurs. These items, when available and applicable, have been consistently mentioned by members as important and helpful for understanding an upcoming promotion and for planning quitlines’ response. National promotions of 1-800-QUIT-NOW have great potential to increase the number of tobacco users reached and counseled for tobacco use cessation throughout North America. While beneficial for expanding quitline reach, increases in call volume may have a significant impact on quitlines’ abilities to provide services to all callers. Adequate information and advanced notice can help quitlines assess staffing levels, protocols and contingencies needed to handle potential call increases.

Due to the nature of earned media (i.e. uncertainties regarding when, where and what information will be included in a story), providing certain details in advance may be more challenging. Despite this, quitlines would benefit from receiving as much information as possible about paid and earned media initiated by any organization promoting 1-800-QUIT-NOW, even if information is tentative.

Background

- What background information was used to create the national promotion?
 - Campaign goals and objectives
 - Theories applied
 - Results and findings from field testing
 - Formative research
- What audience(s) is the promotion intended to reach?

Content

- What “call to action” is being promoted in the ads?
 - 1-800-QUIT-NOW
 - Web site(s)
 - Both
 - Other
- What is the content of ads? Provide scripts and/or electronic copies?

Frequency and Placement *

- When or how often will the ads run? Provide details of the:
 - Media buy
 - Target Rating Points (TRPs)/Gross Rating Points (GRPs)
 - Reach
 - Frequency
- Where will the ads run, be placed or used?
 - Television
 - Print
 - Radio
 - Web
 - Other
 - Grassroots strategies
 - Indoor venues
 - Outdoor (e.g. bus stops, billboards)
 - Direct mail

Potential Impact

- What is the best estimate of the potential impact on quitline calls and what is the basis (e.g. pilot test, focus groups) for these estimates?

Responding to the Promotion

- What are the key anticipated questions and responses that are important to know about the promotion?
- What are the potential areas of concern related to the promotion?

* The information suggested here is not always available or possible to share for every promotion. When national promotions do not include a mention of 1-800-QUIT-NOW, the information provided can be less detailed given the impact on call volumes will likely be manageable. When 1-800-QUIT-NOW is included, a plan for providing enough information to help quitlines prepare for increased calls will need to be developed.

Integration

- What strategies and opportunities are there for incorporating the national promotion into existing “local” promotion efforts including media and non-media approaches?

Evaluation

- What is the plan for evaluating the promotion?
 - *Using Quitline Data to Determine Impact*

Collecting quitline data to better understand the impact of national promotions is important to evaluate promotional efforts. Quitline evaluators and researchers, service providers, funders and national organizations can collaborate to develop a consistent and feasible way to define, report and analyze data. Different technologies, database structures, data collection procedures and wording of questions can make data analysis difficult as can data privacy concerns. Not all quitlines may be able to provide all the information suggested below. Funding for this effort could help address concerns and alleviate some challenges especially for states with limited budgets for reporting and extracting data. The specific data elements that could help assess impact include:

■ Using Quitline Data to Determine Impact

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Call Volumes

- Total calls received by specific phone number (e.g. 1-800-QUIT-NOW, unique state numbers) for a specified period of time.
- Total calls answered live (i.e. by an actual person, not voice mail).

Call Details

- When calls were received:
 - Days of the week
 - Time of day
 - Other
- Types of callers:
 - Tobacco users
 - Employers
 - Proxies (e.g. friend, family, coworker)
 - Healthcare providers
 - Other

- How callers heard about the quitline:
 - Track specific promotions by adding response options related to each.

Customer Service Levels

- Percentage of calls answered within 30 seconds.
- Percentage of abandoned calls.
- Average hold times.
- Number of calls that go to voicemail.
- Length of time to return voice mail messages.

Call Outcomes/Result of Calls

- Number of unique individuals contacting the quitline.
- Percent of callers completing registration (e.g. Minimal Data Set questions).
- Percent of unique callers selecting a service by type of service (e.g. self-help materials, phone counseling, Web-based, etc.).
- Enrollment or registration rates by program type (e.g. brief, proactive, etc.).

Caller Demographics

- To help assess the ads' appeal to different audiences:
 - Gender
 - Age
 - Race
 - Ethnicity
 - Education level

Potential Confounding Factors

- List of promotional factors that may have contributed to call volumes during a promotion:
 - NRT offers
 - Policy changes
 - State-level promotions (paid and earned)
 - Others

Operational Impact

- Document the impact of the promotion on quitline operational costs.

■ Preparing for Challenges

In the event a national promotion generates more calls than quitlines can handle (i.e. call surges), NAQC would like to develop a meaningful, yet feasible response to assist quitlines. National organizations have suggested states pool funds or share resources to meet the funding and service delivery demands of national promotions. Analysis indicates a few states would need additional resources and only a few would be in a position to share resources. After lengthy discussion by the Advisory Council, this proposal was deemed unfeasible due to significant legal concerns about restrictions on the use of state funds to benefit residents of other states.

The following options are intended to provide proactive solutions to call surges that may result from national quitline promotions. Current knowledge regarding the potential impact of national media campaigns on call volumes is still quite limited. Much work is needed to develop a “formula” or process for estimating impact to allow states to make well-informed decisions about preparing their quitline for calls and adjusting state- or local-level promotions.

Media Strategies

- *Use the “Standards for National Promotions of 1-800-QUIT-NOW”.*

To reduce the likelihood of surges, national promoters could use the “Standards for National Promotions of 1-800-QUIT-NOW.” Implementing the proposed standards would help manage the issue and could reduce the potential negative impact created by large increases in calls. The standards (see page 10) address the following aspects of national promotions:

 - Time of year.
 - Frequency.
 - Amount of notice provided to quitlines.
 - Use of 1-800-QUIT-NOW.
 - Preventing conflicts with other promotional efforts.
 - Times of day (considering hours of operation).
 - Roll-out strategies (geographic and staggering buys).
 - Financial assistance for costs related to excess calls.
 - Services promoted (considering diverse services provided by quitlines).
- *Develop a contingency plan*

To address overwhelming call volumes or concerns about the quitline budget, a back-up plan might include the following:

 - Review the call volumes frequently to track the real-time impact of a promotion on the quitline. The actual number of calls received will help determine the need for adjustments.
 - Rotate tagged (i.e. includes 1-800-QUIT-NOW) with untagged ads. This requires multiple versions of the same ad be prepared in advance and made readily available to media outlets within their required time frame.
 - Purchase short waves for television ads and use other media to sustain the effect with a rotation that offers a manageable balance of calls.
 - Identify a non-quitline ad that can be used to fill the purchased time spots if needed.
 - Seek input from experienced media buyers on additional strategies that can be implemented within the parameters of the industry.

Quitline Operational Strategies

To prepare for potential call surges, quitlines can implement operational strategies that best fit their situation. Based on NAQC members' experience with previous call surges and extensive knowledge of the day-to-day operations of quitlines, staffing, service level and technological options can be considered to address surges. Each quitline needs to work with the service provider to assess the positive and negative aspects of each option to determine which to implement and to develop a contingency plan. Examples include:

- *Staffing Options*
 - Shift staff roles (e.g. all staff answer intake calls and schedule counseling calls at a later date).
 - Reduce the number of outbound calls scheduled for the affected time period to allow all staff to answer incoming calls.
 - Bring in temporary staff for registration.
 - Outsource to a company that can handle material orders.
 - Hire part-time staff.
 - Use on-call counselors and those who work from home.
 - Adjust staff schedules to cover the affected time period.
 - Contract with a service provider to handle overflow.

- *Service Level Options*
 - Adjust counseling protocol (e.g. single session counseling or shorten session times).
 - Identify self-service options (e.g. ask those who want information only to leave a message).
 - Create a call-back list by taking down contact information only.
 - Triage callers based on disposition (e.g. tobacco users, proxies, healthcare providers, etc.) or interest in quitting.
 - Adjust NRT being offered or eligibility to receive if limited supply is a concern.
 - Send self-help or information materials after initial call and require those who are interested to call back if interested in counseling services.
 - Limit eligibility (e.g. insurance status, pregnancy status) for counseling services.
 - If the quitline budget for counseling services will not support the increase in calls using other options, refer callers to other cessation services (e.g. Web- or community-based, local programs, cessation clinics).

- *Technology*
 - Direct callers to the Web for registration.
 - Explore the use of Interactive Voice Response systems.
 - Provide menu options to facilitate triage.
 - Add a separate, local telephone line to facilitate tracking of calls (i.e. dialed 1-800-QUIT-NOW or another number).

Funding Options

To prevent overspending of quitline budgets, quitlines need feasible funding options to cover counseling services if surges occur. The most feasible options identified include:

- *States seek additional funding from legislatures or “local” sources or move state promotional dollars to cover counseling services.*

NAQC’s role would be to provide technical assistance support to help make the case for either additional funding or flexible contracting to allow for shifting of marketing dollars to support quitline operations. Resources could include fact sheets and case studies. National partners could advocate for increased quitline funding at the state and national levels.

- *Promoters provide funding for excess calls based on quitline budgets and the estimated increase in call volume.*

This option would require the development of a process and criteria to determine how funding would be requested and granted. Contracting issues would need to be addressed to implement this option. Shifting a portion of national promotion dollars to cover counseling costs should be considered.

- *Promoters pull ads in states unable to handle increased call volumes.*

This option would generate additional costs that would need to be covered by either the state, national promoter or another entity.

- *States with limited funding create advanced contractual agreements with promoters or other organizations to cover the additional cost of providing services as a result of excess calls.*

This option would require individual states to develop agreements with organizations willing to help pay for the increased demand for quitline services. In addition to national promoters, states could approach employers, health plans or other partners to participate in a cost-sharing model.

- *States with limited capacity create advanced contractual agreements with an “overflow” service provider paid for by the state funder or national promoter.*

This option would require individual states to develop agreements with service providers that can handle increased calls during a national promotion. The process by which overflow calls would shift to the overflow vendor as well as protocols for delivering counseling services and data sharing could be addressed during contract negotiations.

- **Create a NAQC mentor program.**

Quitlines with experience handling national promotions or call surges could be “on-call” to assist other quitlines if the need arises. Adding a forum or networking tool to the NAQC Web site to facilitate discussion among members would also be helpful.

■ **Host conference calls before, during and after promotions.**

These networking calls can provide members an opportunity to ask promoters and other quitlines about a promotion and share state-level contingency plans and experiences.

■ **Liaison with national promoters regarding their role in addressing the challenge, including funding.**

NAQC can continue to dialogue with national promoters regarding the potential impact of a national promotion on quitlines. Ongoing communication is key to adequately preparing for and addressing call surges if they occur.

Implementation – Just prior to the launch of a national promotion and during the campaign, the proposed strategies can be implemented to assist quitlines and promoters with sharing and processing information and data. By enhancing the information posted and stored on NAQC’s Web site and continuing to communicate with NAQC members by email, information and data will be distributed in a timely fashion and will be readily accessible.

■ **Create a notification section on the NAQC Web site**

Post information on NAQC’s Web site in an easily accessible location and format to provide members with the most current information about national promotions. Content should minimally include the following:

- “Information Needed to Help Prepare for National Quitline Promotions” (see page 12)
- Contact information to easily submit additional questions about the promotion.

■ **Continue the Communication Protocol created by the PTF**

The PTF developed the following protocol to facilitate information exchange between state and provincial quitlines, funders, service providers and national organizations. The protocol has been implemented and will continue to be used to inform members about national promotions.

- *Promotion Alerts* – The goal of the *Alerts* is to identify potential national communication activities and quickly alert appropriate parties. *Alerts* include any available information about the potential initiative, including the target date for finalization.
- *Promotion Communiqués* – The goal of the *Communiqués* is to identify confirmed promotion activities as soon as they are known. *Communiqués* include summary and comprehensive information about national communication activities.
- *Promotion Detailed Briefs* – The goal of the *Detailed Briefs* is to provide more detailed operational information about promotional activities, including specific initiatives, timing and content. The information is designed to assist quitline operators and funders in planning for and anticipating operational issues that may result.
- *Quarterly Call Volume Summary Reports* – The goal of the *Quarterly Call Volume Summary Reports* is to provide a brief summary of reported call volume by province/state for each quarter, by month, for current year and previous year (when

available). The reports can be used to help analyze impact of future promotions and inform quitline planning activities.

■ **Monitoring, Data Collection, Sharing and Analysis**

Both quitlines and promoters have requested information to better understand the impact of national promotions. Testing the feasibility of collecting this information could contribute to enhanced coordination and the success of existing and future promotion efforts.

Implementation of this strategy will depend on availability of funding.

- *Create a pilot test for data collection and analysis.*
- *Request participation from a sample of states.*
- *Compile a team to develop an evaluation plan.*
- *Identify a mechanism for analysis.*
- *Document the financial impact of providing data.*
- *Disseminate aggregate results through the NAQC Web site and Communication Protocol.*

Information Gathering and Ongoing Feedback – Periodic review of national promotions, the call volumes generated and lessons learned will help in the planning of future efforts to promote quitlines nationally. All stakeholders have repeatedly expressed the need for quitline and media data to help understand the impact and effectiveness of using 1-800-QUIT-NOW in national media. This common need and desire offers an opportunity to collaborate to advance our understanding of how to best implement national promotions in future efforts. Creating a mechanism to regularly convene stakeholders to discuss results of national promotions and recommend changes for future efforts could contribute greatly to this need. Implementation of this strategy will depend on availability of funding.

Section 3: Long-Term Coordination

► Introduction

This section describes next steps and future directions identified by NAQC members and partners while creating the plan to coordinate national media promotions. By in large, when asked about national quitline promotions, NAQC members continue to define the issue more broadly than just paid media campaigns. The range of promotional strategies successfully conducted by state and local organizations over the past few years demonstrate the eventual need for a long-term, coordinated approach to nationally promoting 1-800-QUIT-NOW using more than just paid media. Although this project was narrowly focusing on paid media, NAQC members and partners suggested many other ideas reflected below.

► Understanding the Impact or Effectiveness of National Promotions

The desire to learn from promotions and more systematically collect and analyze data is one of the most important and consistent needs identified by NAQC members and national partners. Without this understanding, quitlines may continue to experience difficulties preparing for future promotions and planning how to best distribute funds between service delivery and promotions. Promotions impact many aspects of operating a quitline including decisions related to staffing, budgeting and service delivery. Some suggested ideas to address the need to understand national promotions include:

- Develop a database of quitline calls received during a national promotion and conduct analysis (perhaps first as a pilot test).
- Convene a panel of experts to make recommendations based on data and results.
- Explore the possibility of using the Web to create a network for data coordination.
- Disseminate findings to the quitline community and national organizations to inform future promotions.
- Develop a quality measure on tracking the impact of promotions.

► Develop a Long-Term Strategy to Actively Promote Quitlines Nationally

Developing a long-term strategy to proactively promote quitlines nationally could help address many of the concerns and challenges identified and discussed throughout this plan as could a collaborative approach to developing and planning national promotions. The combined knowledge and experience of national organizations and quitlines could contribute to more effective promotions that reach more tobacco users with services that are prepared for and able to handle the increase. As part of this long-term strategy, NAQC members and partners have suggested the following:

- Refine and build consensus on a gold standard for promoting quitlines and developing effective ad content.
- Develop a list of strategic partners including non-tobacco control entities and create a plan to work with these partners on developing effective promotions.

- Pursue media and non-media approaches on a national level which could include:
 - Paid media
 - New media
 - Earned media
 - NRT
 - Provider outreach
 - Policy changes
 - Placing 1-800-QUIT-NOW on cigarette packs
- Cultivate relationships with national media networks, editorial boards, etc.
- Pursue pharmaceutical company partnerships (e.g. use of 1-800-QUIT-NOW on NRT packaging, product inserts and promotional materials).
- Identify funding sources for national promotions.

► Funding for Quitline Operations

As described above, the additional expenses generated by increased calls to quitlines as a result of national promotions can be problematic for some states. Continuing to identify options for and availability of funding to financially assist quitlines so they can serve all callers in response to national promotions is an important long-term strategy. Ideas include creating cost-sharing models with employers or health plans, identifying alternate funding sources and continuing to discuss a national solution to handle overflow calls.

Also related to funding is the need for more flexible use of quitline funds to allow states to shift dollars between service and promotions budgets as needed. Some states have successfully taken this approach and can assist by sharing lessons learned with others.

► Technical Assistance Needs

Two additional needs identified during the development of this plan are related to promoting quitlines to specific audiences. Understanding the best promotional strategies to reach priority populations is a common need identified by many in the quitline community. A number of states have done extensive research on reaching and serving specific populations and could share this knowledge with other states and promoters.

Quitlines would also like to implement promotional strategies to educate federal and state-level stakeholders on the continued need for cessation funding and the importance of quitline sustainability.

- ▶ NAQC will disseminate this plan to the quitline community and national organizations interested in quitline promotions. Many of the short-term coordination steps are currently being used or were tested in 2008. The full implementation of short- and long-term steps will depend on future funding and interest. NAQC will continue to facilitate coordination and communication related to national quitline promotions and will keep members and partners updated on lessons learned.

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