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For a complete list of contributors to this and other CanExEd reports please refer to the “CanExEd Foundational Information” available at: <http://afpc.info/system/files/public/CanExEd%20Priorities%20Foundational%20Information.pdf>
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List of Abbreviations

AACP-American Association of Colleges of Pharmacy
AFPC- Association of Faculties of Pharmacy of Canada
ELPD – Entry Level Doctor of Pharmacy Degree
CanExEd- Canadian Experiential Education Project for Pharmacy
CAPSI – Canadian Association of Pharmacy Students and Interns
CPRB- Canadian Pharmacy Residency Board
CPhA-Canadian Pharmacists Association
CSHP-Canadian Society of Hospital Pharmacists
ExEd – Experiential Education
NAPRA-National Association of Pharmacy Regulatory Authorities
NPAC – Neighbourhood Pharmacy Association of Canada
OEE – Office of Experiential Education
PEP-C – Pharmacy Experiential Programs of Canada
SC-Steering Committee
Universities:
MUN – Memorial University of Newfoundland School of Pharmacy
Dal – Dalhousie University College of Pharmacy
U de M – Université de Montréal Faculté de Pharmacie
U of T – University of Toronto Leslie Dan Faculty of Pharmacy
U of W – University of Waterloo School of Pharmacy
U of M – University of Manitoba College of Pharmacy
U of S – University of Saskatchewan College of Pharmacy and Nutrition
U of A – University of Alberta Faculty of Pharmacy and Pharmaceutical Sciences
UBC – University of British Columbia Faculty of Pharmaceutical Sciences

Executive Summary

INTRODUCTION

This final CanExEd report: **Promotion of Experiential Education (ExEd) to Stakeholders** provides a comprehensive marketing strategy for ExEd program's jurisdictional use to meet their goals and objectives. Promotional content (described in previous CanExEd reports) can be distilled into digestible, effective messages intelligently and efficiently delivered to initiate, maintain or augment stakeholder/participant interest and investment in quality ExEd.

METHODS

As per previous reports, PEP-C members were interviewed on this topic. A selective (rather than systematic) literature review was used to discern a reasonable approach to developing marketing and communications strategies. In addition, experts in marketing from academia were interviewed to identify appropriate marketing plan components and foci.

RESULTS

Existing ExEd Marketing

Canadian ExEd Programs' promotional activities tie mainly into recruitment and informational communications. Interviews indicated the ultimate goal in promoting ExEd is to establish adequate placement capacity by

1. Recruiting new preceptors and sites
2. Securing more placement opportunities within established sites

In addition, although not explicitly stated, that building relationships between university ExEd offices and placement sites, and maintaining or enhancing the image of ExEd offices in stakeholders' eyes, also plays an important role in promotion. Various media currently used in promotional activities include e-mail messages to preceptors/managers using programs' databases of e-mails, direct meetings with targeted stakeholders, social media (such as Facebook), and surveys. Annual surveys are designed to ensure the quality of rotations rather than discerning participant needs and preferences.

Perspective from Marketing and Communications Faculty/Staff on Future ExEd Marketing Efforts

In all marketing initiatives, portraying value to the audience is paramount. Alignment from the **mission statement** at a high level down to the measurement of outcomes is necessary to ensure the important **goals** of promotion are met. In close association with the goals, various **audiences** are identified and targeted with carefully chosen **content/key messages** that are personalised according to the value structure of each audience. This content is then delivered using effective **media** (print, electronic, live presentations, face to face conversations, telemarketing). Content conveys ideas and messages that hopefully translate into goal achievement. **Format** of print or electronic media can include: testimonials, informational pieces, annual reports, updates, award announcements, invitations and surveys (or links to webpages that contain various pieces). These products are delivered at a particular **time or phase** in ExEd's cycle (annual recurrence) or transition (from BSc to ELPD).

Given ExEd goals are predominantly jurisdictional in nature (to achieve sufficient rotations), the plans laid out should be implemented on the level of each ExEd Program. The high-regard associated with each Faculty and the ExEd Programs adds support for a predominantly jurisdictional approach. National messages may still benefit ExEd but should be undertaken with consideration and always refer back to the individual university Faculties' ExEd programs for further information. A national approach to developing messages delivered on a jurisdictional level will assist programs in deciding what messages to convey, the audience of interest, the timing, medium and format of delivery and how to discern whether efforts have met with success. In addition, a national approach may allow for development of resource-intensive marketing tools so that costs are distributed.

DISCUSSION

Recommendations:

1. Develop a national ExEd mission statement.
2. Synthesise a market research survey that can be tailored and used by each ExEd program.
3. Author a marketing plan for the short, intermediate and long term horizon for ExEd

Prototypes:

Along with a high-level ExEd mission statement, a short, medium and longer-term marketing plan was developed within the report. The market research survey will require further work on the part of the responsible working group. A checklist was developed to assist ExEd programs in implementing a fully-realised marketing plan.

CONCLUSION

The promotion of ExEd will target preceptors (established and potential), their managers, leaders within provincial and national advocacy and regulatory organisations. Internal Faculty promotion is also advisable so that messages are consistent and available from multiple sources.

Strategies can and should react to outcome findings in order to optimise efficiencies. Considerable resources will be required to implement some major components of the proposed marketing plan and a national effort may assist in

realising these plans. The content of this report has implications for all the CanExEd Priorities but particularly dovetails with Priority #4 (Description and promotion of the value learners add to host organisations and their mandate and #5 (Optimisation of preceptor recruitment and retention).

Table of Contents

I. INTRODUCTION	5
A. PREAMBLE	5
B. PREVIOUS AND UPCOMING REPORTS	5
C. BACKGROUND	5
II. PRIORITY #7: PROMOTION OF EXPERIENTIAL EDUCATION TO STAKEHOLDERS	5
A. RESEARCH QUESTIONS	5
B. METHODS	6
C. RESULTS	6
1. PROCESS	6
2. FINDINGS	6
D. DISCUSSION	9
E. CONCLUSION	22
F. REFERENCES	23
G. APPENDICES	ERROR! BOOKMARK NOT DEFINED.
1. MARKETING CHECKLIST FOR EXED PROGRAMS	ERROR! BOOKMARK NOT DEFINED.
2. UNIVERSITY OF MANITOBA PATIENT NOTIFICATION/APPRECIATION	ERROR! BOOKMARK NOT DEFINED.
3. AGILE PROJECT (UBC) POSTERS	ERROR! BOOKMARK NOT DEFINED.

I. Introduction

A. Preamble

The CanExEd Project Context and Scope, Objectives, Intended Audience and Use are available in a separate document entitled, "CanExEd Foundational Information". It is available at: <http://afpc.info/content/canexed-reports>.

Appendices to the individual reports are contained within a separate CanExEd Appendices document available at: <http://afpc.info/content/canexed-reports>.

B. Previous and Upcoming Reports

This is the seventh in a series of reports to be delivered between 2014 and March 2016. Each completed report is available at: <http://afpc.info/content/canexed-reports>.

C. Background

Priority #7 of the Canadian Experiential Education (CanExEd) Project for Pharmacy:

Promotion of Experiential Education to Stakeholders

meshes promotional content with promotional strategies to intelligently (focused, well-timed and engagingly) and efficiently (time, energy and fiscally) gain investment from stakeholders in providing adequate volume of ExEd placements that provide maximal benefit to students, preceptors, their practice environments/organisations and patients. Potential promotional content has been extensively identified within the previous 6 CanExEd Reports. This final report aims to distil the messaging into digestible, effective messages that can be intelligently and efficiently delivered to initiate, maintain or augment interest and investment in quality ExEd.

II. Priority #7: Promotion of Experiential Education to Stakeholders

A. Research Questions

A series of questions was collaboratively developed with PEP-C and the CanExEd Steering Committee to direct lines of investigation regarding the promotion of ExEd. These questions included:

1. What does promoting ExEd mean? Improving impressions? Uptake? What is the culture of ExEd? How do external stakeholders relate to ExEd?
2. What strategies are currently employed or in progress to promote involvement in experiential education (Rx and non-Rx, Canada and international)?
3. How is the effectiveness of these strategies measured and what constitutes a successful promotional campaign? What level of evidence is there that these strategies are effective at increasing good will and uptake of ExEd?
4. Describe what is necessary to promote ExEd to stakeholders. (Budget, time, expertise, communication conduits, content [research, narrative, requirements] audience-group vs. individual, gov't vs. professionals, timing). What is feasible?
5. Do institutional and organizational accrediting bodies include standards pertaining to ExEd? Do associations, corporate chains have mechanisms for promoting ExEd uptake through their publications or performance expectations/evaluations? Do these organisations have a responsibility to promote involvement?

B. Methods

PEP-C members were interviewed on this topic and those findings are included here. A systematic literature review was not undertaken due to the nature of marketing and the existing literature making it difficult to discern a best approach. Experts in marketing were interviewed and those conversations identified appropriate marketing plan templates and necessary components.

Semi-structured interviews

An interview protocol was developed to explore Priority #7 research questions. The interview used semi-structured questions to guide discussion and was iterative in nature. Priority #7 Appendix A (Available in the Appendices document <http://afpc.info/content/canexed-reports>) provides the complete interview guide.

C. Results

1. Process

Semi-structured interviews

Sixteen interviews were conducted between July and January 2015. Interviews were predominantly one-on-one with two exceptions where the interviewer interviewed 2 participants simultaneously.

- 13/16 interviews were with Canadian Academics (Dean =1, Experiential Educators =11, assessment expert =1) within Pharmacy Faculties. All Faculties were included with the exception of two.
- 1/16 was with a US ExEd expert (Texas Tech)
- 1/16 was a member of NAPRA
- 1/16 was with a learner

Interview duration ranged from 45 to 180 minutes. Long interviews were completed over 2-3 sessions. All interviews were conducted by the Project Manager and captured via audio and when possible, video.

Interviewees were very forthcoming in their conversations regarding ExEd and were keen to participate. None expressed concern or questions regarding informed consent for recording.

A separate set of 4 interviews (not recorded) in January and February 2016 were held with four marketing and communications staff/faculty at four universities' Faculties of pharmacy (UBC, U of S, U of W and U of T) in preparing this report.

Grey Literature

Written marketing literature of interest used in formulating the report is available in the references.

Stakeholder feedback

Included within the Findings section below.

2. Findings

Semi-structured interviews

ExEd Faculty

Canadian ExEd Programs' promotional activities tie mainly into recruitment and other informational communications. Interviews indicated the ultimate goal in promoting ExEd is to establish adequate placement capacity by

1. Recruiting new preceptors and sites
2. Securing more placement opportunities within established sites

In addition, although not explicitly stated, that building relationships between university ExEd offices and placement sites, and maintaining or enhancing the image of ExEd offices in stakeholders' eyes, also plays an important role in promotion. The primary question ExEd offices pose in shaping their promotional activities is whether they are adequately visible to their target stakeholders. Target audiences of promotional activities identified included preceptors and prospective preceptors, students (as future preceptors), managers (institution and community pharmacy) pharmacist organizations such as CPHA and CHSP, NAPRA, and provincial regulatory authorities (PRAs). Various media currently used in promotional activities include e-mail messages to preceptors and managers using programs' databases e-mails, direct meetings with targeted stakeholders, social media outreach (such as Facebook), and the use of surveys. Annual surveys are designed to ensure the quality of rotations is acceptable and not for the most part pertain to participant marketing needs and preferences, development needs or impressions of ExEd or ExEd programs.

Interviewees did not describe a marketplace segmentation of preceptors (never vs. one-time vs. occasional vs. continual). Nor was there identification of varying approaches according to level of rotation (early vs. intermediate vs. advanced). ExEd offices have large databases of individuals' contact information and employment however they do not contain extensive amounts of individual information on preferences and needs. There are notations made on files in some programs to maintain a history of remarkable occurrences such as challenging rotations, personal achievements and important conversations that should inform future communications but no systematic profiling of individuals that would dictate how they might be most effectively marketed to.

Marketing and Communications Faculty/Staff

Discussions with business and marketing experts associated with pharmacy programs at U of T, U of Waterloo, U of S and UBC highlighted considerations in the development of a marketing/promotional plan for ExEd.

The messages are the nails that are driven by the strategy hammer. **In all marketing initiatives, portraying value to the audience is paramount.** Stakeholders are willing (perhaps subconsciously) to absorb switching costs if the perceived value balances or exceeds the cost. ExEd programs must realise that once the switch is made there is to some extent, a locking into the new paradigm. If the ExEd portrays a longitudinal landscape of bundled opportunities through synergies of students, preceptors and academics, stakeholders may see value and clamour into the new paradigm.

Alignment from the **mission statement** at a high level down to the measurement of outcomes is necessary to ensure the important **goals** of promotion are met. Goals are to change or establish perceptions and behaviour. Behaviour change would expect to lag behind a perception change. And in some instances, despite perceptions changing, behaviour may not accordingly follow suit.

In close association with the goals, various **audiences** are identified and targeted with carefully chosen **content/key messages** that are personalised according to the value structure of each audience. This content is then delivered using effective **media**. Content conveys ideas and messages that hopefully translate into goal achievement. The promotional strategy doesn't use the goals in the content but rather exposes the audience to ideas that will induce buy-in, curiosity, interest and trials. The core message should remain consistent but tailored to each audience.

Print media: Advertisements in publications and physical mail-outs are very expensive promotional media. Publishing of academic ExEd research in peer-reviewed academic journals may be high profile however the breadth of reach may not balance the effort needed to successfully publish. The choice of journal would determine the degree of marketing achieved (i.e. Canadian Pharmacists Journal being practitioner-focused vs. American Journal of Pharmacy Education which has an academic audience).

Electronic media: Better value (compared to print medium) would be achieved through inexpensive direct electronic textual communications via e-mails and electronic newsletters of various corporate, provincial and national organisations. Audio and video communications may be effective but more resource-intensive ways of reaching important participants. White board animations are an interesting and effective electronic video medium. Presence in social media (Facebook, Twitter) may be advisable however the high resourcing needed to keep these information sources fresh (2-3 communications per week minimum) is considerable and may not be balanced by the benefit. ExEd offices have an incredibly valuable database of current and former preceptors and managers and it should be used to directly market to each segment of stakeholder participant.

Live engagements: Speaking opportunities at local conferences, trade shows and meetings are an excellent way to deliver messages. An important live medium is the opportunity to present QI and research projects at professional provincial and national conferences. Inclusion of stakeholders on CanExEd working groups is another face-to-face promotional medium. Broadcast media cover some major events and providing an advance press release can result in further interviews and further dissemination. For major initiatives, a launching (receptions, meals, etc.) event may be warranted. In-person site visits is a particularly potent medium for promoting ExEd to preceptors, managers and staff of potential and existing rotation facilities. These site visits can use a form of academic detailing with participants. Live preceptor development sessions at the universities allow faculty and staff to meet preceptors and managers in person.

Format of print or electronic media can include: testimonials, informational pieces, annual reports, updates, award announcements, invitations and surveys (or links to webpages that contain various pieces). Professionals are inundated with information and by necessity will scan communications. Communications that use consistent, clear graphics and/or short, headlines that pique interest are more likely to lead to deeper engagement in the material. Headlines with a compelling message, an interesting angle or tantalising quote can cause the reader to open a file or click on a link are an effective way to induce deeper engagement. The presentation of a controversy or an authority's position might serve this purpose. Lead-ins that empower the reader with 'key' knowledge or ability may ring true as a means for determining if the reader is building their level of proficiency. The tone of communication should be fresh, authoritative and broadly inclusive. Credibility may be inherent in the academic associations of ExEd programs and leveraging the reputation of these institutions is encouraged.

These products are delivered at a particular **time or phase** in ExEd's cycle (annual recurrence) or transition (from BSc to ELPD).

Measuring the impact of a promotional strategy requires consideration of meaningful outcomes and an associated interval of time. A baseline measurement is necessary to compare the identified outcomes to. Approximately 30% of direct e-mails are opened by recipients (personal communication). This might be a reasonable intermediate outcome to attain early in a promotional campaign. Other measures include website analytics (using Crazy Egg or similar) to identify if web links are clicked and when visitors terminate their visit to a webpage. Social media sites (Twitter, Facebook and blogs) track rates of views and shares. Whether these quantitative measures are of value is debateable given the over-all goals of a promotional campaign (recruitment and retention rates, augmenting impressions). Personal feedback from audience members (polls concluding a piece, focus groups, interviews) may result in better characterisation of changes in perception and behaviours.

Promotional Strategy Practicalities:

- Be aware of scope creep as a risk. Keep the most important messages and audiences at the forefront. Given the time and resources available, there are realistic limits to messages and audiences reached. Simple strategies are advisable.
- Promotional events have a long lead-in. Generally 6 months are needed to plan and execute an event.
- Flexibility, agility and adaptability are beneficial in promotion since it's difficult to know in advance what approaches will have the intended effect
- Websites require considerable financial and time resources. Do not underestimate the investment in this vital component of a promotional strategy.
- Use brand standards in electronic communications so that all systems can open the file and render it legible.
- Multimedia is engaging but also expensive for high-production value segments. Rough video may be more realistic and quicker to produce.
- Using external perspectives in promotion brings an unbiased and unfamiliar/engaging quality.

Given ExEd goals are predominantly jurisdictional in nature (to achieve sufficient rotations), the plans laid out should be implemented on the level of each ExEd Program. The high-regard associated with each Faculty and the ExEd Programs adds support for a predominantly jurisdictional approach. National messages may still benefit ExEd but should be undertaken with consideration and always refer back to the individual university Faculties' ExEd programs for further information. A national approach to developing messages delivered on a jurisdictional level will assist programs in deciding what messages to convey, the audience of interest, the timing, medium and format of delivery and how to discern whether efforts have met with success. In addition, a national approach may allow for development of resource-intensive marketing tools so that costs are distributed.

Grey Literature

The Canadian Association for Co-Op Education Manual identifies market research and analysis(1) as important for establishing the feasibility of a new or change to a program. In this case, the changing of curricula across Canada is well underway and whether the associated changes to ExEd rotations are feasible is not up for debate. At this point, there may be benefit to establishing what the market/stakeholders will value when it comes to the request to increase the number of rotations in practice sites or value in relation to the structures and supports central to ExEd Programs. In effect, knowing your client (values, needs and activities) ensures on-target messaging(2). UBC's Agile project (available at: http://www.aacp.org/meetingsandevents/AM/2015/Documents/abstracts/ResearchEdu/ExperientialEdu/Opportunities_to_Enhance_Institutional_Experiential_Edu-MutuallyBeneficialActivities_Analysis.pdf) sought to identify 'Mutually Beneficial Activities' (MBAs) of institutional preceptors in advance of placing greater numbers of students in this particularly limited

and highly-desirable marketplace. The research used mixed methods (informal exploratory interviews, literature review and online survey) to identify a reference list of MBAs all or some students should be able to do on rotation. A student abilities wish list was also identified. (3) The approach encompassed in this project is of interest as a wider market research strategy is undertaken to not only identify MBAs but also discern the individual preferences of participants in terms of communications, their impressions of ExEd and their needs and wants relating to it.

Knowing the product (ExEd) and knowing the competition (other practice initiatives without an educational focus) are two other components in developing a full sense of value to the client. (2)

The level of familiarity the audience has with the product being promoted will dictate content. If a market has a history with the product, focus is better placed on specific program detail rather than general concepts. (1)

Every interaction with individuals who potentially or currently host students (at the management and practitioner level) can be seen as a promotional interface. Of particular interest are opportunities where audiences either visit the program or the program visits the audience on site. These are extremely important interfaces where the individual players get to know one another, provide feedback and targeted conversations to the concerns and interests of the individual. Telemarketing campaigns can also result in commitment to the program.

Stakeholder Feedback on Report

This report was reviewed by PEP-C SIG of AFPC, the 4 marketing expert contributors and the Steering Committee for the CanExEd Program. The following considerations were raised:

- Concern was expressed regarding the execution of the recommendations and prototypes put forth in this report.
- It may be premature to prescribe a medium and long-term marketing plan until the results of a short-term plan are measured. Subsequent marketing strategies should be adaptable to use techniques shown previously effective.
- A range of costs associated with video segments (dependent on production costs) might facilitate the use of this medium.

D. Discussion

This section applies previous concepts to an ExEd marketing plan.

1. Market Research (knowing the client): Each ExEd program requires knowledge of why individuals/organizations participate (or do not). A survey tool should be developed nationally and subsequently tailored by each program to suit their specific needs. The Agile Project's approach to discerning Mutually Beneficial Activities (MBAs) could be adapted for broader application in each program to establish MBAs in conjunction with other aspects of value of the various components of ExEd for a more comprehensive market survey. Even if ExEd programs believe they know what preceptors need and want after years of working with them and occasional professional development needs surveys, the action of surveying on broad topics provides a positive impression on participants and allows comparison of needs and preferences across jurisdictions. Simple items such as, "How long would you likely watch a video for?" can be useful in developing products. Focus groups may be helpful to explore uncertain or important findings from the surveys. The results from the market survey should be applied to the general database of participants. For instance, if most of the experienced, consistent preceptors only seem to be interested in messaging about CPPD, perhaps this group should be omitted from or minimally be exposed to messaging on the value of students.
2. Goals of a promotional strategy for ExEd include:
 - Establish sufficient high-quality preceptors and associated placements for students at each level of ExEd
 - Strengthen preceptors' and organisations commitment to education in the field
 - Instil preceptors with the belief that their educational skills are valued
 - Provide preceptors with assurances of effective supports (continuing professional preceptor development (CPPD), presence in the field of academic liaisons, communities of educators) in their educational role in order to build confidence, initiative and creativity (Pharmacists may be reserved and humble)
 - Convince preceptors and organisations of the positive balance of benefits vs. cost of hosting students. Benefits in terms of financial value and convenience/ease as sufficient return on investment (time and effort)
 - Increase stature of ExEd to provincial and national organisations as a means to advancing practice and establishing funding for execution of mutually-beneficial prototypes

- Establish stakeholder trust in ExEd as providing high-quality experiences for students, preceptors and their organisations

Discussion surrounding whether ExEd's image needed changing was met with the suggestion that ExEd's image may not presently be adequately established. It would seem as though there was little evidence to suggest exactly how stakeholders viewed ExEd in Canada and until that data was gathered efforts to change or rebrand would be premature. As the promotional plan is developed however, it should bear in mind how ExEd needs to be seen by the promotional audience. Desirable impressions of ExEd include:

1. Progressive
 2. Beneficial
 3. Authentic (not overly academic or onerous)
 4. Professional
 5. Responsive (to practice changes, student preference and preceptor challenges)
 6. Impactful
3. Content: May be important to be inclusionary so that one school is not disadvantaged in comparison to others. Make sure rural initiatives/underserved areas are included. Bundled opportunities to ExEd can include (jurisdictionally dependent):
- Patient program development/piloting support/community
 - Research support resources
 - Professional development (CPPD offerings, teaching is the best way to learn)
 - Pathways for preceptors who identify student difficulty
- General content should include:
- QI improvement/research data (there is evidence from US and Canadian publications) illustrating value/benefit
 - Recognition and rewards for all stakeholders in education but also research (ExEd rotation site, preceptors, staff and perhaps patients)
 - Stakeholder satisfaction/success testimonials
 - Curricular changes and expected student abilities at each ExEd level commencement
4. Audience:
- External parties are the obvious marketing audience however, there is likely benefit from developing an internal strategy for all ExEd Programs across the country. Doing so ensures consistent messages are delivered effectively.
 - Preceptors (segments of never, one-time, occasional vs. consistent)
 - Alumni
 - Practice organisations (non-preceptor staff and patients) such as community pharmacy corporations, interprofessional health teams, and institutions.
 - Provincial organisations such as PRAs, CSHP chapters, provincial advocacy bodies
 - National organisations such as CPhA, CSHP, NAPRA, NPAC. The message would be a national picture rather than jurisdictional
5. Phasing/timing. Beyond the core message, what is important to promote in the short, intermediate and long-term strategic communications plan. Short term (1-2 years prior to new curriculum) can be fully detailed but because the market can change and new information can influence strategies, the long-term plan should maintain a high-level perspective so it can quickly react to findings/changes.
- Short-Term:
- Known (from literature at this point and stakeholder feedback) professional benefits and student abilities
 - Quality monitoring efforts
 - Communicate curricular changes
- Intermediate-Term (year 1-3 of new curriculum)
- Recognition of preceptors (annual awards, sites and staff cameos, possibly patients engaged in educating)
 - Augmented quality improvement
 - Provide actual stakeholder benefits confirmed from research and QI over 1st year
- Long-Term (year 4 of new curriculum onwards)
- Annual awards recipients
 - Annual CPPD focus
 - Invitations to participate in research initiatives
 - ExEd stakeholders receiving other awards and publications

- Interview with early adopters/champions

6. Media

- AFPC website
- Alumni offices' publications
- PRA newsletters and provincial advocacy bodies
- NAPRA and national advocacy bodies
- Pharmacy U Conference, jurisdictional and national conferences
- Print Option: Pharmacy Practice may be a good free conduit for conveying messages
- General media outlets (local and national)
- Direct e-mail to stakeholder

7. Evaluation

- Intermediate endpoints of site visitation rates and surveys completed can be useful for early gauging of whether the end goals have been met
- Programs can anecdotally and formally measure whether an initiative resulted in an intended effect. It's important to also discern the reasons it did or didn't work. Also, some techniques that work in one market may not in another. Don't necessarily rule out if it did not work in one jurisdiction. Tracking anecdotal outcomes discerned in conversations are difficult but mechanisms should exist to collect data of this nature.
- Meaningful endpoints that measure whether goals (volume and quality) have been met include:
 - 15% overage availability for each type of rotation (community, institutional, primary care, non-direct patient care) that indicates solvency of the program and adequate choice for students
 - Q 2-3 year mixed methods (survey, interview, focus groups) audit of local, provincial and national organisations' leadership to describe levels of trust, impressions of progressiveness, responsiveness and value provided.
 - Proportion of sites and preceptors that achieve a given level of quality according QI criteria (see CanExEd Project QI strategy document for details)

Recommendations:

1. To ensure the perpetuation of the recommendations and prototypes within this report, the academic lead for the 'Recruitment and Retention' Working Group (which includes this Priority as well as #4 and #5) will report to the AFPC Communications chair on the achievements, next steps and required resources.
2. Develop a national ExEd mission statement.
3. Synthesise a market research survey that can be tailored and used by each ExEd program.
4. Author a marketing plan for the short (detailed), intermediate and long term (general) horizon for ExEd that:
 - Is implementable predominantly jurisdictionally with a select National components
 - Achieves 7 high level goals (above)
 - Conveys content that uses interesting and professional headlines and tone to:
 - Firmly establish the primary value to participants of having students present on ExEd rotations
 - Inform participants of the secondary value of relationships with academia
 - Update audience on changes to curriculum, ExEd structures/procedures
 - Provide announcements of recognition and rewards
 - Reach various segments of the market (i.e. frequency of preceptoring, early, intermediate, advanced rotation providers)
 - Focuses on an external audience of 'mature' audience/market who has reasonable familiarity with ExEd. An important segment is preceptors who have had students and subsequently declined further involvement. At time of writing, programs did not have a mechanism for ascertaining their attrition rates. (4)
 - Includes communications to recent/new graduands
 - Targets the important audiences of pharmacies' decision-makers/managers as well as leaders within local, provincial, corporate and national organisations
 - Includes strategy for an internal (staff) audience within academic institutions to ensure all provide consistent messaging
 - Leverages the established positive reputation and relationship ExEd co-ordinators have with preceptors and their management

- Utilises existing electronic communications conduits in ExEd programs, local, provincial and national meetings and regularly scheduled textual electronic communications from these organisations (associations, PRAs).
- Maximises live interactions at conferences, tradeshow, academic-practice site visits and stakeholder meetings.
- Sets out predetermined thresholds for outcomes evaluating the success of marketing plan

Prototypes:

1. ExEd Mission Statement (for further discussion at PEP-C)

To provide high-quality ExEd placements that allow students to integrate existing and develop further knowledge, skills and attitudes in the course of practicing pharmacy while providing value to preceptors and the organisations they practice within.

2. Market Research Survey

To be developed by working group. Run a basic one the first year. Subsequent years build on the core items keeping those felt important. Expect responses of 30% of mail-out. Tailor to audience segments.

A summer student or student on rotation could develop a prototype survey this spring/summer (2016) with other jurisdictions repeating the exercise once the prototype is refined and ready for wider implementation.

3. Marketing plan

A summer student or student on rotation could provide at least short-term marketing tools indicated within this plan this spring/summer (2016) with other jurisdictions building on the prototype.

Summary

ExEd Programs across Canada wish to collaborate in developing a national plan to promote / market their programs in alignment with their mission, goals and objectives. The promotional plan outlined here is simple but comprehensive with a view to ensure utility regardless of the particular academic program and the program's associated horizon to implementing new curriculum. As Pharmacy programs across Canada continue to transition to curricula where students learn in ExEd rotations for a full 1/3 of the 4-year program, the necessity of finding and keeping sufficient numbers of high-quality rotations is paramount. The marketing strategy contained here is meant to achieve ExEd's mission of **providing high-quality ExEd placements that allow students to integrate existing and develop further knowledge, skills and attitudes in the course of practicing pharmacy while providing value to preceptors and the organisations they practice within.**

Planning Group

This marketing plan was conceived and drafted by the Project Manager for the CanExEd Project. It was refined with input from experts in the realm of pharmacy management and policy in academia and received stakeholder input from AFPC's PEP-C special interest group as well as the CanExEd steering committee. Further work will be perpetuated by a working group (WG) charged with this Priority as well as interlinking Priority #4: Description and Promotion of the Value Learners Add to host Organisations and their Mandate (5) (available at <http://www.afpc.info/system/files/public/Priority%204%20February%202016.pdf>) and Priority #5: Optimisation of Preceptor Recruitment and Retention(4) (available at: <http://www.afpc.info/system/files/public/Priority%205%20Report%20February%202016.pdf>).

ExEd SWOT (know your product)

Strengths

Stakeholder familiarity (as preceptors, former students or observers)
 Rigorous academic Education
 Personal connection with participants
 Depth of expertise in education and CPD
 Databases of participants and contact details
 Technology to support existing components of program
 Collegiality between programs (similar challenges)
 Focused on successful administration of placements

Weaknesses

Traditionally focused on administration
 Resourcing variability (staff, technology, research funds)

High staff turnover
 Sluggish to change secondary to investments in current long-standing models
 Inauthentic activities structuring ExEd (program dependent)
 Onerous student assessment (perception)
 Unproven abilities of students within new curricula
 Educational research/QI data in Canadian environment scarce
 Variable timing of curriculum transitioning

Opportunities

Pharmacy practice experiencing immense change (moving toward cognitive fees for service and away from pharmaceutical commodities) that ExEd can leverage
 Currently in economic down cycle and professionals must do more with less resourcing. Students contribute to productivity and patient health.
 Pharmacists may be keen to infuse practice with new enthusiasm and creativity. Educating students and advancing practice using student-led/staffed initiatives is a proven way to enhance practitioner satisfaction.
 Practice research in Canadian community pharmacies currently is suboptimal. Students and connections with academia can facilitate rigorous, publishable research.
 Non-direct patient care rotations can be developed to create structures and plans for managing the changing practice landscape.
 ExEd Programs have an opportunity to position themselves as wellsprings of expertise, student manpower and knowledge creation.

Threats

Pharmacist market contraction leading insufficient placement volume
 Level of student knowledge, skills or attitudes are poorly matched to rotation requirements resulting in participant withdrawal or reluctance
 Ill-preparedness for major swings in pharmacist employment sectors
 Corporate mandate precludes student placements within those environments. Possibility if other duties seen as having more benefit to the organisation than hosting students.

Goals

1. Establish sufficient volume of placements for students at each level of ExEd
2. Maintain and develop high-calibre preceptors
3. Establish, maintain and augment high-calibre ExEd sites
4. Strengthen preceptors' and organisations' commitment to ExEd
5. Portray ExEd Programs as:
 - Appreciative of preceptor participation and expertise
 - Progressive in terms of practice advancement
 - Authentic (not unrealistically academic or onerous)
 - Responsive (to practice change, student preferences and preceptor challenges)
 - Effective at delivering students and supports that confer benefit to all parties
 - Professional

Objectives

Table 1: Marketing Plan Objectives

Objective	Specific	Measurable	Achievable	Realistic	Timely
Ensure solvency of ExEd Program	Achieve 15% coverage of rotations in each rotation subtype (institutional, community, primary care and non-direct patient care)	Number of needed rotations of each type x 1.15 = target	Some Canadian schools have managed this	Challenging	Legacy programs deadline: mid-January New programs deadline: perpetual audit 3 months in advance (i.e. for 1 st half cycle deadline February 1 st , 2 nd half of cycle, August 1st
Ensure high-calibre of preceptors	1. Annual rate of 50% of preceptors engaging in some	1. Yes, through self report, live event	Not optional	Yes	1. Data analysed q 6 monthly April 1 st and October 1 st at each Program

	<p>form of educationally-focussed continuing preceptor professional development (CPPD) and 100% of new preceptors undertaking basic preceptor capability training</p> <p>2. Identify highly functioning preceptors for particular recognition. See Report #5 for detail on preceptor recognition: http://www.afpc.info/system/files/public/Priority%205%20Report%20February%202016.pdf</p>	<p>attendance</p> <p>2. 1 National preceptor of the year award along with 10 provincial recipients</p>			<p>2. Preceptor of the Year awards announced just as recruitment drive gets underway. Recipients further interviewed for monthly informative articles/promotional pieces</p>
<p>Certify high-calibre sites are hosting students</p>	<p>Attain 80% compliance with triangulation QI tools for new and established sites. See page 29 of Report #6: Characterisation of Exceptional ExEd Sites' Best Practices for details (available at: http://www.afpc.info/system/files/public/Priority%206%20Report%20February%202016.pdf)</p> <p>Identify highly-functioning sites for particular recognition</p>	<p>Triangulation strategy comprised of</p> <ul style="list-style-type: none"> • Online site self-assessment report • Good standing with the PRA • Accredited by appropriate body • External awards and recognitions • Standard site visit check list scoring highly on particular domain • Student and preceptor survey results <p>Provide national award for rotation site of the year</p>	<p>Unknown</p>	<p>Yes</p>	<p>Review (ideally using peer group) 6 components on a q 2-4 year cycle (TBD). Maintain scrapbook of site profiles and awards and nominations from students. Publicly recognize selected sites in publications and website.</p>
<p>Ensure preceptors and sites perceive and receive value for</p>	<ul style="list-style-type: none"> • >75% of preceptors rate the value of students either somewhat or highly outweighing the time and 	<p>Yes on preceptor survey</p>	<p>Unknown but literature would support</p> <p>Unknown</p>	<p>Yes but maybe only at 3rd year of new curriculum</p>	<p>Annual survey will provide longitudinal indication of rising value</p>

their investment in student education	<p>energy invested in the student. See Report #4 for details on this topic: http://www.afpc.info/system/files/public/Priority%204%20February%202016.pdf</p> <ul style="list-style-type: none"> • Ascertain the \$/h value of a student • Transparency in process for matching students to rotation site/preceptor 	ExEd offices report annual transmission of this information	Yes	Yes	Communicate prior to curricular shift and after refinements as may contribute to buy-in
Elucidate preceptors' and practice sites' commitment to education of students in the field	<p>1. Practice environments hammer out educational mission statements. See page 29 of Report #6: Characterisation of Exceptional ExEd Sites' Best Practices for details (available at: http://www.afpc.info/system/files/public/Priority%206%20Report%20February%202016.pdf)</p> <p>2. On-boarded preceptors/ sites continue to offer rotation slots</p>	<p>1. Of the 1/3 of sites reviewed annually, 75% achieve/ renew statement</p> <p>2. Sites offer >50% of maximal possible rate of rotations</p>	Yes, as a part of CQI for sites'	Unknown- may need to revise expectation	Medium-term objective. Likely 3-5 years
ExEd programs are viewed positively by direct participants and stakeholders	<p>Programs are perceived as:</p> <ol style="list-style-type: none"> 1. Appreciative 2. Progressive 3. Authentic 4. Responsible 5. Effective 6. Professional 	<p>On likert scale survey items, >66% of respondents (preceptors, managers and advocacy organisation leaders) indicate Entirely or Somewhat Agree to statements on each quality.</p>	Yes, as surveys are already a major part of ExEd's CQI	Participant rate of agreement is arbitrarily set	Mixed Methods: Annual surveys, focus groups will provide longitudinal indication of rising value. Suggest only surveying 1/3 of participants (rotating) each year to reduce burden.

Market Research (know your audience, the industry, competitors)

There are a few **audiences** that ExEd will benefit by targeting:

1. Preceptors: Existing active and inactive preceptors
2. Potential Preceptors: Alumni, non-pharmacist health professionals, other particularly desirable pharmacy practitioners

3. Managers: Individual decision-makers within interprofessional primary care environments (priority), institutions, community pharmacies and in some instances, the overarching corporate community pharmacy structure
4. Advocacy Organisation Leadership: Individuals responsible for pharmacy practice portfolios mainly jurisdictionally (CSHP provincial Chapters, provincial associations) and secondarily nationally (most importantly NPAC, CPhA, CSHP divisions)
5. Regulatory Authorities Leadership: Individuals with a stake in ExEd mostly on a provincial basis (Provincial Registrars or Professional Credentialing portfolios for each province and territory) and for informational purposes on a national scale (NAPRA)
6. Internal ExEd faculty and staff as well as Deans, chairs and didactic instructors

The values, needs and activities of the audience/market segments determine the content messaging and format, media and timing of the marketing strategies. It would be wise to undertake a market analysis of all audiences (jurisdictional results using nationally-developed tools) to confirm or refute their needs are indeed those assumed within this chart. The tool may build on the Agile Project's example (see Appendix) and should include a section pertaining to preferences for marketing media and frequency.

Table 2: Audience Needs

Audience	Assumed Needs
Preceptors	<ol style="list-style-type: none"> 1. Perceive benefit of student presence on patient care, professional satisfaction, organisational mandate 2. CPPD (Priority #3 for details: http://www.afpc.info/content/canexed-reports) to maintain preceptor competency (and use toward annual CPD requirement for licensing) 3. On-site liaisons with faculty 4. Assistance with challenging student scenarios 5. Recognition of their teaching excellence 6. Understand potential education site development 7. Comparison of ELPD to BSc Pharm students and rotation objectives
Potential Preceptors	<ol style="list-style-type: none"> 1. Understand the up-front investment and long-term value in the role 2. Perceive the academic requirements of assessment and feedback and learning objectives are realistic and not burdensome 3. Initial education to ensure ready/capable and confident 4. Criteria for site on-boarding and future site development
Managers	<ol style="list-style-type: none"> 1. Evidence showing students on rotation provide value to: <ul style="list-style-type: none"> • organisation (financial, knowledge, skills) • preceptors (satisfaction, knowledge, skills) • clients (patients or service purchasers) 2. Assurance that any concerns are dealt with effectively and efficiently 3. Perceive the academic requirements of assessment and feedback and learning objectives are realistic and not burdensome 4. Criteria for site on-boarding and future site development
Advocacy Organisation Leadership	<ol style="list-style-type: none"> 1. Communication channels to ExEd leadership are open so that prototypes and novel practice can involve learners and ExEd programs 2. Established mechanisms to involve students in national and provincial initiatives 3. See ExEd as responsive, progressive/facilitating practice evolution & professional
Regulatory Authorities Leadership	<ol style="list-style-type: none"> 1. Informed of how regulations can facilitate changing ExEd approaches 2. Updates of changes to ExEd program processes and policies and how the public will benefit/will not be at risk
Internal ExEd Faculty and Staff	<ol style="list-style-type: none"> 1. Information about major changes and challenges confronting ExEd 2. Familiarisation with current priorities of ExEd departments as they transition curriculum or maintain course 3. Evidence supporting requests for increased resourcing for best practice 4. Research/QI plans that involve in-house skillsets 5. Knowledgeable about the messages transmitted to external audiences

The ExEd 'industry' in healthcare consists of similar programs in medicine, nursing, physiotherapy, occupational therapy, speech pathology, dentistry and dietetics. Professionals generally understand the necessity of learning and honing in the field and expect to be called upon to ensure the perpetuation of their professional skills and knowledge. The structure of pharmacy ExEd may be slightly different from these other professions in terms of points of ExEd within the overall curriculum, length of rotations and performance assessments and supports. Previous reports included reviews of the literature pertaining to various professional fields' ExEd.

In recent years, there has been a limited amount of crossover where preceptors in one profession supervise students from a different discipline. Interprofessional education is encouraging of professions learning and practicing together but in ExEd to this point, these instances have been the exception rather than the rule and this type of model has been employed for a limited time in students' ExEd trajectory.

Competition from other professional fields is of minor concern as most entry-level degree programs are all concerned that their students learn predominantly within their own field. Graduate level degree programs often allow for more cross pollination between professions but this would not be expected to measurably impact on the undergraduate ExEd program's ability to secure sufficient numbers of high-quality rotations for students. Competition between pharmacy programs appears to be a concern domestically in Ontario (Waterloo and U of T) as well as between provinces especially for the perceived limited pool of hospital placements. The University of Waterloo and University of Toronto have very different models of ExEd which means the choice between them may be easier for preceptors/sites to make given that Waterloo has a Co-op model where students are interviewed, selected and paid for their time in ExEd and U of T employs the approach common to the rest of Canada where students are matched with their sites and are unpaid. Nevertheless, there is still potential for competition given the finite institutional site numbers. There is also some competition for placements between provinces when students request placements outside the usual boundaries of the local university. Indeed, there have been instances where ExEd offices try to protect their territory. If ExEd Programs wish to be responsive to their students' preferences, it may be wise to join together in an attempt to secure a pool of rotations that are available for students from outside the jurisdiction that that be used in a lottery system. Preceptors could indicate whether they would be interested in hosting students from a different Canadian university. This would build the perception of ExEd being responsive to needs and preferences of students and preceptors. The final sources of competition include pharmacy technician students and International Pharmacy Graduates (IPG) requiring mentorships and internships. Possibly the most important competition to ExEd being fully embraced in various practice environments is the competition for pharmacists' time. Various initiatives (relocation, IT, QI, novel patient care programs for example) can result in moratoriums on student presence. ExEd programs can counter these competing demands by placing students in rotations with objectives that meet student needs while simultaneously contributing to resolving these cited, time-limited challenges in creative ways.

Messages, Audiences, Format, Media and Timing

Table below sets out a prototype for promoting ExEd to identified audiences. It should be revisited and revised pending the results from individual jurisdictional market analysis specified in the previous section.

Table 3: Menu of Messaging Content and Methods for Various Audiences

Note: Highlighted yellow sections provide top-4 priorities for ExEd programs preparing to embark on ELPD curriculum. Highlighted blue sections provide top-3 priorities for ExEd programs in-transition. Highlighted grey sections provide top-3 priorities for programs who have graduated their first cohort of ELPD students * Denotes National collaborative development advised

#	Message	Audiences	Format	Media	Timing
1	Students on rotation provide benefit to preceptors, patients and the organisation (accounting for adequate supervision): 1. Clinical service expansion (year-round rotations in ELPD) 2. Preceptor satisfaction & skills 3. organisational coherence See priority #4 for content ST: Benefit to patient outcomes applies to ELPD curriculum (generalised from US data) Benefits re: preceptors apply regardless of curriculum. LT: ExEd generates own data	Preceptors Potential preceptors Managers Internal ExEd Faculty and staff	<ul style="list-style-type: none"> Preceptor & manager champions in each sector describing perspectives on student value Testimonials from preceptors of the year Evidence citation re: benefit to patient outcomes 	Short video clips Direct e-mail headlines linking to clips and/or textual narrative* on ExEd Website Conference presentations of QI/research findings* from jurisdictions or nationally Peer-reviewed journal articles*	C: q 6 months 1 month prior to major recruitment deadline. Q 6 monthly reminder ST: US extrapolated data and preceptor findings along with video clips MT: maybe some domestic QI/research available LT: Canadian-generated QI/research results

18 CanExEd Project Priority #7: Promotion of ExEd to Stakeholders

	from QI initiatives and research				
2	ELPD Students will be prepared for patient care earlier in the 4-year curriculum (overview of curriculum) Preceptors regardless of their degree attained are well-prepared for students of either degree program Priority #5 for detail Rotation duration, schedule and number/student	Preceptors Potential preceptors Managers	Informational piece Testimonial from preceptors who lived the transition in early and advanced rotations	Short video clips* Direct e-mail headlines linking to clips and/or textural narrative* on ExEd Website	ST-MT: 1 year prior through 4 years into transition
3	Preceptors are provided with continuing support from ExEd in their role. Note: CPPD can be a part of annual relicensing requirements 1. Preceptor Competencies and (in development) 2. Newly vetted / available CPPD 3. Upcoming live events (every communication) 4. Initial capability training (every communication) 5. Annual focus on a particular competency within that program See Priority #3 for content	Preceptors Potential Preceptors Managers Internal ExEd Faculty and staff	Informational pieces Topic at Working Group meetings Preceptor-faculty interaction	Electronic print e-mail headline* linking to webpage. Links to national CPPD platform* (See priority #3) when it is developed In-person 1x / year and otherwise web conference interface Faculty-Preceptor Liaison positions	C: Quarterly mail-out. ST: Messages #4, 5 MT: #1, 3, 4, 5. LT: #1-5
4	Preceptors helping students with performance deficits can expect timely and personal attention from ExEd via: 1. Supplementary student assessments 2. Remediation plans See Priority #1 for details 3. ExEd coordinator responsibilities See Priority #5 for details 4. ID of LT trends of student gaps	Preceptors Managers Regulatory Authorities' Leadership Internal ExEd Faculty and staff	Informational pieces re: Supplementary Assessment & remediation plans Champions' Narrative Transparent Canadian QI data re: rates of 'challenging students' Topic at Working Group meetings	Electronic print headlines* linking to podcast* or written narrative/ interview and to actual supplementary assessments and particular remediation plan modules* (when developed-see Priority #1 for details) Provincial and national conference or meeting presentations In-person 1x / year and otherwise web conference interface	C: Q 2 years MT: #1 and 2 (link to CPPD) Champions' narrative of message #3 LT: Message #1-4 via conferences and electronic print

5	<p>New preceptors are welcome and receive particular attention to prepare them for their role See Priority #3 for Preparation details</p>	<p>Potential Preceptors (including upcoming/recent graduates) Managers Internal ExEd Faculty and staff</p>	<p>Invitations to participate Testimonials from new preceptors Informational pieces re: initial preceptor CPPD</p>	<p>Alumni office newsletters Pharmacy practice articles* PRA newsletters* Advocacy orgs' newsletters* Electronic print headlines to managers</p>	<p>C: 3 months prior to recruitment deadlines (likely 2x/year in ELPD program, 1x / year in BSc. Pharm)</p>
6	<p>Preceptors and Sites merit wide recognition for their excellence See Priority #5 and #6 for details</p>	<p>Existing/Potential Preceptors Managers Regulatory Authorities' Leadership Advocacy Organisation s Leadership Internal ExEd Faculty and staff</p>	<p>Announcement of award winners Invitation to event</p>	<p>Announcement on ExEd Websites, AFPC website. Alumni office newsletter Advocacy orgs newsletters Electronic print headlines to preceptor database Early evening reception at each faculty or community (if remote) to honour the recipient</p>	<p>C: annual awards Cameos in provincial newsletters and national winners (site and preceptors) in AFPC newsletter and national org's newsletters/ publications*</p>
7	<p>Sites receive initial and continuing support from ExEd to build excellent educational practice environments <ul style="list-style-type: none"> Initial QA onboarding criteria Ongoing dimensions of quality Plans for achieving See Priority #3 and 6 for details</p>	<p>Existing/Potential Preceptors Managers Regulatory Authorities' Leadership Advocacy Organisation s Leadership Internal ExEd Faculty and staff</p>	<p>Informational pieces Topic at Working Group meetings</p>	<p>Electronic print e-mail headline linking to webpage. Links to national CPPD platform* when it is developed as it will also contain staff development opportunities In-person 1x / year and otherwise web conference interface</p>	<p>C: Annual message ST: QA criteria M&LT: ongoing dimensions of quality and plans for achievement</p>
8	<p>Administrative requirements of academic rotations are generally light See Priority #1, #2, #3 (orientation) and #4 for details</p>	<p>Existing/Potential Preceptors Managers</p>	<p>Informational pieces</p>	<p>Electronic print e-mail headline* linking to webpage. Links to national CPPD platform* assessment module (or program's website page with orientation)</p>	<p>ST: current approach to assessment Ad hoc MT-LT: highlight improvements /changes as they arise</p>
9	<p>Providing student rotations is an excellent way to give back to the profession while reaping many benefits See Priority #5 for content.</p>	<p>Existing/Potential Preceptors Managers Regulatory Authorities' Leadership</p>	<p>Student narrative Patient narrative</p>	<p>Short video clips*. Direct e-mail headlines* linking to clip of student and patient impressions of the importance of</p>	<p>C ST: student narrative LT: student in concert with patient</p>

	Advocacy Organisations Leadership Internal ExEd Faculty and staff		students' work*.	
Totals				ST: 11 messages MT: 14 messages LT: 12 messages

ST: Short Term (immediate – 1 year into ELPD)

MT: Medium Term (year 2 to 4 of ELPD)

LT: Long Term (year 4 and beyond of ELPD)

C: Continual

Evaluation

The following outcomes are ideally fed from each program into a national database for comparison and longitudinal tracking so that major changes can be attributed to particular practices. Effective practices are better identified and potentially replicated by other programs thereby raising the quality of all programs across Canada.

Table 4: Marketing Strategy Impact Measures

Quality Indicator	Expected Outcome
1. Sufficient volume of rotations available for ExEd Programs	15% overage of rotations in each rotation subtype (institutional, community, primary care and non-direct patient care)
2. Preceptors are augmenting their educational skills	50% of preceptors engaging in some form of educationally-focussed continuing preceptor professional development (CPPD)
3. Identify highly-functioning preceptors for particular recognition	100% of new preceptors undertaking basic preceptor capability training Each program/province will identify and award a preceptor annually. A national recipient will also be awarded
4. Sites are engaging in educational CQI	80% compliance with triangulation QI tools for new and established sites
5. Identify highly-functioning sites for particular recognition	Each program/province will identify and award a site annually. A national recipient will also be awarded
6. Preceptors find benefits/value to having a student	>75% of preceptors rate the value of students either somewhat or highly outweighing the time and energy invested in the student
7. Ascertain the \$/h value of a student	Preceptors estimate the value of having a student between 33 and 50% of a pharmacist's wage
8. Practice environments hammer out educational mission statements as a marker of commitment to education	Of the 1/3 of sites reviewed annually, 75% achieve/ renew statement
9. On-boarded preceptors/ sites continue to offer rotation slots	Sites offer >50% of maximal possible rate of rotations
10. ExEd programs are perceived as: 1. Appreciative 2. Progressive 3. Authentic 4. Responsible 5. Effective 6. Professional	On likert scale survey items, >66% of respondents (preceptors, managers and advocacy organisation leaders) indicate Entirely or Somewhat Agree to statements on each quality.

Budget (5 year horizon)

The budget identifies a few marketing tools that may be more advisable (comparative, longitudinal data) or feasible (high cost) nationally. They are in red font.

Table 5: Marketing Strategy Budget

Marketing Tool	Cost Breakdown	Jurisdictional (\$/ ExEd program)	National (\$)
Marketing Analysis	Prototype Development: 160 h of undergraduate	2880	5760

	<p>student \$18/hr = \$2880 Prototype Analysis: 160 h of undergraduate student \$18/hr = \$2880 Analysis of data ExEd supervision 10 h x \$45 = in kind Application in subsequent jurisdictions: Estimate ½ to repeat exercise above</p>		
Short Term			
Videos (narrative about benefits to students and preceptors adequate skills) Note: Cost will depend on production value and level of Evidence analysis hence wide ranges	<p><u>2 Video Segments (suggest 10 minutes)</u> Production editing assistance \$2500/segment = \$5000 Audio-video recording equipment = \$2 500 PLUS Researcher (incorporates national QI results)-film maker wages \$50/hour x 160 hours = \$ 8000 OR Summer student wages (not evidence-based): \$18/hour x 160 hours = \$2880</p>		<p>Low end (no research analysis) =10 380 High end (with QI analysis) =15 500</p>
Website	All pharmacy programs have one or access to one		
Graphic Designer	90 h x \$40/h for 9 major pieces		3200
QI / research findings	In kind (ExEd offices)		
Preceptors and sites of the year reception	<p>Annual (x1) provincially National (x1) piggybacked on CSHP or CPhA catering and room x 2 hours x 200 people plus plaque</p>	200-1000	4000
Copy Writing	40 h x \$40/h		1600
Working group attendance by external members	<p>5 non-academics on this R&R WG for travel and accommodation x 1 initial meeting (thereafter web conferenced) 5 people x \$1 700 / meeting at AFPC conference</p>		8500
Total: 3080- 3880			33 440-38 560
Medium Term			
Videos (preceptoring as a way of giving back) Note: Cost will depend on production value	<p>Production editing assistance for 1 Video Segment (suggest 5 minutes) @ \$2000 Research student wages: \$18/hour x 80hours = \$1440</p>		3440
Website	All pharmacy programs have one or access to one		
Copy Writing	140 h x \$40/h for 14 major pieces	In kind	5600
Journal abstract/article writing		In kind	
Conference presentations (CDN benefits QI/research results)		In kind	
Working group attendance by external members	R&R WG web-conferencing		In kind (AFPC)
			9 040
Long Term			
Videos (patient benefit) Note: Cost will depend on production value and level of desired evidence hence wide ranges	<p><u>1 Video Segment (suggest 10 minutes)</u> Production editing assistance \$2500 PLUS Researcher (incorporates national QI results)-film maker wages \$50/hour x 80 hours = \$4000 OR Summer student wages (not evidence-based):</p>		<p>Low end (no research analysis) =3940 High end (with QI analysis) =6500</p>

	\$18/hour x 80 hours = \$1440		
Podcast (challenging student scenarios)	Production editing assistance for 1 Audio Segment (7 minutes) = \$2 000 Research student wages: \$18/hour x 80 hours = 1440		3440
Website	All pharmacy programs have one or access to one		
Copy Writing	100 h x \$40/h for 10 major pieces	In kind	4000
Journal abstract/article writing		In kind	
Conference presentations (Student remediation QI results and addressing strategies)		In kind	
Working group attendance by external members	R&R WG web-conferencing		In kind (AFPC)
			Total: 11 380-13 940
		Total: 3080-3880	53 860-61 540

Note: The Budget does not include wages for a Faculty-preceptor liaison position that has been identified within other Priority Reports. In a few programs (UBC, U of A, Waterloo, U of T) these types of positions have been created with multiple expected quality outcomes one of which includes promotion and marketing of the respective ExEd program. To some degree, these liaisons are the perfect way to implement 'academic detailing'. This marketing technique is a very effective way to change practice and has been utilised by pharmaceutical industry and governmentally-funded agencies to implement practices. If the UBC ratio of one half-time Facilitator to five preceptors is used as an pilot model and each of these preceptors provides 16 rotations a year in their environment, an ExEd Program could expect to have 80 students move through that Facilitator's remit annually.

1 facilitator = 5 preceptors x 16 rotations each annually = 80 rotations

Brought up to a larger scale:

The largest student volume in a Canadian university requires 2160 rotations per year (7 Advanced and 2 Early rotations for each of the 240 individuals per cohort)

About 27 half-time Facilitators would be needed to fully support preceptors in the field responsible for these annual 2160 rotations. Wages (\$50/hour) would approximate \$1.4 million.

If levels of support were deemed less desirable in community or other environments, it's possible that higher ratios could be implemented. There may be some possibility of organisations splitting the costs of this type of facilitator position in cases where it is clear to the organisation that by having more student presence equates to greater benefit to the organisation or, the facilitator is deemed important for the optimal practice of the preceptors. The facilitator has been identified as key to solving many of the challenges ExEd currently faces with respect to ensuring accurate and effective student performance assessments and feedback (Priority #1) effectively implementing new preceptor-student models (Priority #2), continuing preceptor (Priority #3) and site development (Priority #6), balancing the value of students with rotational demands (Priority #4), recruitment and retention (Priority #5), and finally, marketing. Essentially, the use of these liaisons can drive many of the recommendations and prototypes within the CanExEd Project.

E. Conclusion

The promotion of ExEd will target preceptors (established and potential), their managers, leaders within provincial and national advocacy and regulatory organisations. Internal Faculty promotion is also advisable so that messages are consistent and available from multiple sources. The marketing plan for ExEd is congruent with the mission statement (prototyped) and the overall goals of ExEd across Canada. A wide array of formats and media are necessary to effectively reach the identified audiences. Strategies can and should react to outcome findings in order to optimise efficiencies. Considerable resources will be required to actually implement some major components of the proposed marketing plan.

F. References

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