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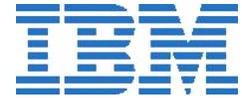
Digital-to-Analog Converter Box  
Coupon Program

# Consumer Education Plan

## Final



**IBM Global Business Services**



**Deliverable**

**December 4, 2007**

**U.S. Department of Commerce  
National Telecommunications and Information Agency (NTIA)**

## **Digital to Analog Converter Box Coupon Program**

### **Consumer Education Plan**

In Response to Contract Number: DG-1335-07-CQ-0054

**Final**

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OFA/EXT Clients Acquisition MGT D/OFA6  
1305 East-West Hwy., 7th Floor  
Silver Spring, Maryland 20910

Submitted by: IBM Global Business Services  
12902 Federal Systems Park Drive  
Fairfax, VA 22033

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## 1. Introduction

On February 17, 2009, full-power broadcast television stations in the United States will stop broadcasting programming on analog airwaves and begin broadcasting only in digital. This important change will benefit consumers by offering better-quality viewing and more programming options. It will also free valuable spectrum for use by emergency responders. To continue receiving programming after the transition date, consumers with analog television sets that receive broadcast over the air – those with rabbit ears or rooftop antennas, will need to (1) purchase a new TV set with an integrated digital component that is able to receive digital broadcasts, (2) sign up for cable or satellite service, or (3) purchase a converter box.

To support the nation's digital transition the Federal government is offering up to two \$40 coupons per U.S. household to apply toward the purchase of coupon eligible converter boxes. These converter boxes decode the digital signal back to analog for display on analog TV sets, enabling them to keep working after the transition.

### 1.1 Purpose and Scope of the Coupon Program's Consumer Education Program

The Federal government, led by the Federal Communications Commission and the U.S. Department of Commerce's National Telecommunications and Information Administration (NTIA), is keenly aware of the need to educate all U.S. residents about the transition, especially those households that rely exclusively on over-the-air broadcasts and who may lose television service without a converter box.

This document describes the consumer education plan for the NTIA Digital-to-Analog Coupon Program. The plan will be used by NTIA to chart the overall direction of the consumer education campaign, as well as to guide the development of specific campaign messages, materials, and strategies. Although the consumer education plan will evolve over time as a result of campaign planning, monitoring, and evaluation, this document provides a strategic plan of action to educate consumers about the digital transition and the coupon program through the 2009 application deadline.

The IBM/Ketchum team, working with NTIA, will develop and implement the Coupon Program consumer education campaign in coordination with several other campaigns being conducted concurrently to raise awareness about the digital transition. NTIA's involvement in campaigns led by the DTV Transition Coalition, the cable and broadcast television industries, entertainment industry, advocacy groups, electronic retail organizations, and the Federal Communications Commission (FCC), will help ensure that the Coupon Program consumer education plan complements and enhances these efforts, rather than duplicates them. Although these campaigns will likely include information about the availability of coupons to help pay for converter boxes, the education plan described in this document will be the only campaign devoted *solely to the Coupon Program*, and, as such, will direct consumers to the Web site, toll-free number and other resources that serve as the official places to find news and information on the program.

### 1.2 Setting the Stage: Situation Analysis

To lay the foundation for a successful consumer education plan on the Coupon Program, it is important to understand the cultural, media, and political environment in which the digital transition will be introduced and how it will impact the way information reaches consumers. An analysis of the

environment will help to identify the right messages, accurately target audiences, and create a vision for the campaign.

### 1.2.1 What are the characteristics of the analog OTA households?

According to the Consumer Electronics Association, there are currently about 13.5 million analog OTA households in the United States. These numbers correlate closely with data reported by the Television Bureau of Advertising's Market Track and Nielsen Media Research in 2005 and 2006, which indicated slightly over 14 million households at that point in time. Populations who are on average more reliant on OTA exclusively include minorities (African American, Hispanic, Asian, Native American), seniors, rural residents, low-income individuals and people with disabilities.

The populations with the potential to be most affected by the transition are also those that rely heavily on television to keep them informed – they cannot afford to lose this connection. In general, these populations are likely to confront challenges related to obtaining and redeeming coupons including mobility issues, language barriers, and distance from retail centers in insular rural communities. These populations may also be susceptible to the potential for fraud and abuse of the Coupon Program, so it will be important to help them understand how to apply for coupons and where to redeem them.

### 1.2.2 Where can analog OTA households be found?

Although a large proportion of the analog OTA households are rural, there is also a large component of analog OTA households in urban and suburban areas. Appendix B shows the estimated number of analog OTA households by Demographic Marketing Area (DMA).

### 1.2.3 What is the current environment?

In addition to the understanding the characteristics of the analog OTA households, several other factors will inform the program strategy, including considering the attitude of the media and potential partner organizations, as described below.

#### ***Media Environment***

At the present time, with the coupons not yet available, the news media have shown modest interest in running stories about the coupon program. The challenge will be to keep the media interested and engaged at critical times throughout the campaign so that they will print or air stories about the progress of the Coupon Program. The consumer education program will run in a very crowded media environment – the most critical time for consumer action will be about three to four months before the transition date which occurs during the 2008 presidential elections and at the height of the holiday season. Messages during this period will need to be consistent as always, but also convey a sense of urgency so that consumers pay attention and understand that they will have to take action in the coming months.

#### ***Partner Environment***

Organizations ranging from advocacy organizations to community groups have already expressed a willingness to help spread the word about the digital transition. Additionally, the broadcast and cable industries have pledged more than one billion dollars in advertising and other outreach activities to inform their viewers and subscribers about the transition. NTIA is already working closely with industry to ensure that the messages heard from different sources are complementary. The challenge will be engaging partners who are in the position to carry the campaign messages most effectively and

efficiently to the target audiences, and in ensuring that they deliver accurate information about the program.

### 1.3 Strategic Approach

The primary goal of the consumer education program is to ensure that consumers know about the digital TV transition and that the Coupon Program is available to assist them during this transition. The strategy for making the most effective use of the program's available consumer education funds includes:

- *Targeting the geographic areas with the greatest numbers of analog OTA households.* Section 3.2.3.1 describes the elements of a national campaign to ensure that Americans generally, and OTA exclusive households specifically, receive information about the Coupon Program. As described earlier, the one billion dollar commitment from industry will ensure that most Americans are informed about the transition.
- *Targeting over-represented demographic populations.* While campaign messages will undoubtedly reach all U.S. consumers, there are certain demographic groups that have a higher percentage of OTA only households than the general population. This campaign will focus primarily on reaching consumers who are low-income, minority, senior, rural, and disabled, who account for a higher percentage of OTA exclusive households.
- *Leveraging media and partners for direct communication.* The Coupon Program's consumer education campaign will not use paid advertising, but will rely on work with broadcast and other media, as well as various partner organizations that represent the target populations and, therefore, have a vested interest in ensuring their constituents do not lose their television broadcast. The rationale for a combined media and partnership approach is based on compelling evidence that shows that earned media programs work best in conjunction with other community programs, when consistent messages are conveyed through a variety of channels and in several different contexts. The success of this campaign relies on coordinating media efforts with other initiatives by partners and community groups that touch the lives of the target populations.

### 1.4 Specific Tactics

The consumer education program plan includes four major work streams, as described below.

- Defining the Message
- Leveraging Earned Media
- Leveraging Partnerships
- Measuring the Results

#### 1.4.1 Defining the Message

At the foundation of the campaign will be messages and materials that will be communicated to consumers who visit the Coupon Program Web site, call the toll-free number or write or fax NTIA, as well as to partners who will convey the information to their constituents. The campaign will have its own identity in the form of a simple icon or image which will appear on all materials. The messages will be as clear and simple as possible so that there is no confusion over how to request a coupon and how to use it to buy a converter box. Materials will be available in English and Spanish. Partners may apply their logos to the campaign materials and print them for wide distribution. Partners are also

encouraged to translate materials into other languages. The toll-free line will have a TTY for hearing impaired individuals. The following strategies apply:

- Deploy messages that move consumers from awareness to understanding and action.
- Develop a program identity that distinguishes the Coupon Program.
- Develop campaign materials that are effective, flexible and customizable.

The consumer education program will be executed in two phases. These phases are flexible and may change based on review of tracking data and coupon applications/redemption data

- Education Phase – September 2007 to March 2008
  - Moderate activity conducted through media outreach and partner activity aimed at educating consumers about the Coupon Program and how they can participate.
- Participation Phase – April 2008 to March 2009
  - Intensified efforts by partners and more urgent media messages to encourage households to request and redeem coupons in advance of February 17, 2009.

By the end of the participation phase, the team will also provide recommendations for communication efforts about the program for the period April 1 through July 10, 2009.

#### 1.4.2 Leveraging Earned Media

The “earned media” strategy will focus on encouraging coverage of the Coupon Program through multiple media channels – television, radio, newspapers, magazines and online – to offer breadth of coverage across the U.S. and its territories. Simultaneously, media outlets that are favored by the identified target populations will also be provided with story ideas that resonate specifically with their viewers, listeners, and readers to ensure depth of coverage among these consumers.

#### 1.4.3 Leveraging Partnerships

Complementing the media strategy will be the active engagement of partners that serve or represent the individuals and households within the target populations. These include advocacy groups representing older Americans, ethnic minorities, disabled Americans and others, as well as public libraries and places of worship. NTIA with the IBM/Ketchum team will work with a number of partners representing each target audience subgroup to educate them about the Coupon Program so that they, in turn, can educate their constituents through their regular methods of communication, including direct mail, magazines, and often, person-to-person contact. Many of these partners will mobilize their members to provide one-on-one help to individual households in applying for the coupons and purchasing and installing the converter boxes. The campaign objective is to communicate that information through trusted sources to educate consumers to the transition and the Coupon Program and urge them to take action.

#### 1.4.4 Measuring the Results

Along the way, the consumer education campaign will be measured against agreed upon program objectives and adjusted as necessary. The objectives will be monitored through coupon application and redemption data, in conjunction with data available from the consumer electronics, cable and

satellite industry, to determine the extent to which analog OTA households are aware of the Coupon Program. Material distribution, partner activity and media coverage will be tracked to help measure movement against campaign objectives (see section 5, Measurement and Tracking for more detail).

## 1.5 Goal and Objectives

The goal of the coupon program consumer education campaign is to:

**Educate U.S. residents who receive only over-the-air broadcasts on analog television sets about the digital transition and the converter box coupon program.**

Program objectives include:

- Increase awareness of the converter box coupon program as one option available to consumers navigating the digital transition.
- Generate requests for coupons through calls to the toll-free number, visits to the campaign Web site, or written or faxed correspondence.
- Engage partners to disseminate information about the coupon program to geographic and demographic target audiences.
- Provide media information and tools needed to report on the Coupon Program.

## 2. Target Audiences

The tactics used to educate consumers about the Coupon Program – earned media and partner outreach – ensure that consumers throughout the U.S. and its territories will have an opportunity to learn about the program. However the primary target audience for the consumer education program will be the approximately 13.5 million over-the-air-only households in the U.S. and Puerto Rico. The target audiences, and how the team will prioritize outreach to these audiences, are described below.

### 2.1 Geographic Prioritization of the Target Audience

In order to maximize campaign resources, while ensuring that those most vulnerable to losing their television broadcast completely are communicated to most often, the IBM/Ketchum team has prioritized all U.S. Designated Market Areas (DMAs), as tracked by Nielsen, to ensure the level of effort in each area is appropriate. The rankings are based on the following:

Ranking	Basis for Ranking	Level of Outreach
Red	<ul style="list-style-type: none"> <li>▪ Number of OTA households more than 150,000 and/or</li> <li>▪ Percentage of OTA households more than 20 percent and/or</li> <li>▪ Top 10 city of residence for largest target demographic groups</li> </ul>	Very High
Orange	<ul style="list-style-type: none"> <li>▪ Number of OTA households between 75,000 and 150,000 and/or</li> <li>▪ Percentage of OTA households between 16 and 20.0 percent and/or</li> </ul>	High

Ranking	Basis for Ranking	Level of Outreach
	<ul style="list-style-type: none"> <li>Ranked 11-20 as city of residence for largest target demographic groups</li> </ul>	
Yellow	<ul style="list-style-type: none"> <li>Number of OTA households less than 75,000 and/or</li> <li>Percentage of OTA households less than 16 percent and/or</li> <li>Ranked below 20 as city of residence for largest target demographic groups</li> </ul>	Moderate

The following provides a market by market overview of intensity rankings.

DMA Rank	DMA Name	State
1	New York	NY
2	Los Angeles	CA
3	Chicago	IL
4	Philadelphia	PA
5	San Francisco-Oak-San Jose	CA
6	Dallas-Ft. Worth	TX
7	Boston (Manchester)	MA
8	Washington, DC (Hagerstown)	DC/MD
9	Atlanta	GA
10	Houston	TX
11	Detroit	MI
12	Tampa-St. Pete (Sarasota)	FL
13	Phoenix (Prescott), AZ	AZ
14	Seattle-Tacoma	WA
15	Minneapolis-St. Paul	MN
16	Miami-Ft. Lauderdale	FL
17	Cleveland-Akron (Canton)	OH
18	Denver	CO
19	Orlando-Daytona Bch-Melbrn	FL
20	Sacramnto-Stktn-Modesto	CA
21	St. Louis	MO
22	Pittsburgh	PA
23	Portland, OR	OR
24	Baltimore	MD
25	Indianapolis	IN
26	Charlotte	NC
27	San Diego	CA

		CT
28	Hartford & New Haven	
29	Raleigh-Durham (Fayetteville)	NC
30	Nashville	TN
31	Kansas City	MO
32	Columbus, OH	OH
33	Cincinnati	OH
34	Milwaukee	WI
35	Salt Lake City	UT
36	Greenville-Spartanburg-Asheville	SC/NC
37	San Antonio	TX
38	West Palm Beach-Ft. Pierce	FL
39	Grand Rapids-Kalamazoo-Battle Creek	MI
40	Birmingham (Anniston and Tuscaloosa)	AL
41	Harrisburg-Lebanon-York	PA
42	Norfolk-Portsmouth-Newport News	VA
43	Las Vegas	NV
44	Memphis	TN
45	Oklahoma City	OK
45	Albuquerque-Santa Fe	NM
47	Greensboro-High Point-Winston-Salem	NC
48	Louisville	KY
49	Buffalo	NY
50	Jacksonville, Brunswick	FL
51	Providence (RI) -New Bedford (MA)	RI/MA
52	Austin	TX
53	Wilkes Barre-Scranton	PA
54	New Orleans	LA
55	Fresno-Visalia	CA
56	Albany-Schenectady-Troy	NY
57	Little Rock-Pine Bluff	AR
58	Dayton	OH
59	Mobile (AL) -Pensacola (FL)	AL/FL
60	Knoxville	TN

61	Richmond-Petersburg	VA
62	Tulsa	OK
63	Lexington	KY
64	Ft. Myers-Naples	FL
65	Charleston-Huntington	WV
66	Flint-Saginaw-Bay City	MI
67	Wichita-Hutchinson Plus	KS
68	Roanoke-Lynchburg	VA
69	Green Bay-Appleton	WI
70	Tucson (Sierra Vista)	AZ
71	Toledo	OH
72	Honolulu	HI
73	Des Moines-Ames	IA
74	Portland-Auburn	ME
75	Omaha	NE
76	Springfield, MO	MO
77	Spokane	WA
78	Rochester, NY	NY
79	Syracuse	NY
80	Paducah (KY) -Cape Girard (MO) -Harsbg (IL)	KY/MO/IL
81	Shreveport	LA
82	Champaign & Sprngfld-Decatur	IL
83	Columbia, SC	SC
84	Huntsville-Decatur (Flor)	AL
85	Madison	WI
86	Chattanooga	TN
87	Jackson, MS	MS
88	South Bend-Elkhart	IN
89	Cedar Rapids-Wtrlo-IWC & Dub	IA
90	Burlington (VT) - Plattsburgh (NY)	VT/NY
91	Harlingen-Wslco-Brnsvl-McA	TX
92	Tri-Cities, TN-VA	TN-VA
93	Baton Rouge	LA
94	Colorado Springs-Pueblo	CO
95	Waco-Temple-Bryan	TX

96	Davenport (IA)- R.Island-Moline (IL)	IA/IL
97	Savannah	GA
98	Johnstown-Altoona	PA
99	El Paso (Las Cruces)	TX
100	Charleston, SC	SC
101	Evansville	IN
102	Ft. Smith-Fay-Sprngdl- Rgrs	AR
103	Youngstown	OH
104	Lincoln & Hstngs-Krny Plus	NE
105	Myrtle Beach-Florence	SC
106	Ft. Wayne	IN
107	Greenville-N.Bern- Washngtn	NC
108	Tallahassee (FL) - Thomasville (GA)	FL/GA
109	Springfield-Holyoke	MA
110	Reno	NV
111	Tyler- Longview(Lfkn&Ncgd)	TX
112	Lansing	MI
113	Traverse City-Cadillac	MI
114	Augusta	GA
115	Sioux Falls(Mitchell)	SD
116	Peoria-Bloomington	IL
117	Montgomery-Selma	AL
118	Boise	ID
119	Fargo-Valley City	ND
120	Eugene	OR
121	Macon	GA
122	SantaBarbra-SanMar- SanLuOb	CA
123	Lafayette, LA	LA
124	Monterey-Salinas	CA
125	Yakima-Pasco-RchInd- Knnwck	WA
126	Bakersfield	CA
127	La Crosse-Eau Claire	WI
128	Columbus, GA	GA
129	Corpus Christi	TX
130	Chico-Redding	CA
131	Amarillo	TX

132	Columbus-Tupelo-West Point	MS
133	Rockford	IL
134	Wausau-Rhineland	WI
135	Monroe (LA) -El Dorado (AR)	LA/AR
136	Wilmington	NC
137	Duluth (MN) -Superior (WI)	MN/WI
138	Topeka	KS
139	Columbia-Jefferson City	MO
140	Beaumont-Port Arthur	TX
141	Medford-Klamath Falls	OR
142	Erie	PA
143	Sioux City	IA
144	Joplin (MO) -Pittsburg (KS)	MO/KS
145	Albany, GA	GA
146	Wichita Falls (TX) & Lawton (OK)	TX/OK
147	Lubbock	TX
148	Salisbury	MD
149	Palm Springs	CA
150	Bluefield-Beckley-Oak Hill	WV
151	Terre Haute	IN
152	Bangor	ME
153	Rochestr (MN) -Mason City (IA) -Austin (MN)	MN/IA
154	Anchorage	AK
155	Wheeling (WV) - Steubenville (OH)	WV/OH
156	Panama City	FL
157	Binghamton	NY
158	Minot-Bismarck-Dickinson	ND
159	Odessa-Midland	TX
160	Biloxi-Gulfport	MS
161	Sherman, TX-Ada, OK	TX/OK
162	Gainesville	FL
163	Idaho Falls-Pocatello	ID
164	Abilene-Sweetwater	TX
165	Hattiesburg-Laurel	MS
166	Clarksburg-Weston	WV

167	Yuma (AZ) -El Centro (CA)	AZ/CA
168	Missoula	MT
169	Utica	NY
170	Billings	MT
171	Quincy (IL) -Hannibal (MO) -Keokuk (IA)	IL/MO/IA
172	Dothan	AL
173	Elmira (Corning)	NY
174	Jackson, TN	TN
175	Lake Charles	LA
176	Watertown	NY
177	Rapid City	SD
178	Marquette	MI
179	Alexandria, LA	LA
180	Jonesboro	AR
181	Harrisonburg	VA
182	Charlottesville	VA
183	Bowling Green	KY
184	Greenwood-Greenville	MS
185	Meridian	MS
186	Grand Junction-Montrose	CO
187	Laredo	TX
188	Lafayette, IN	IN
189	Parkersburg	WV
190	Great Falls	MT
191	Twin Falls	ID
192	Butte-Bozeman, MT	MT
193	Eureka	CA
194	Bend, OR	OR
195	Cheyenne, WY-Scottsbluff, NE	WY/NE
196	Lima	OH
197	San Angelo	TX
198	Casper-Riverton	WY
199	Ottumwa (IA) -Kirksville (MO)	IA/MO
200	Mankato	MN
201	St. Joseph	MO
202	Fairbanks	AK
203	Zanesville	OH
204	Presque Isle	ME
205	Victoria	TX
206	Helena	MT
207	Juneau, AK	AK
208	Alpena	MI
209	North Platte	NE

210	Glendive	MT
N/A	Puerto Rico	

\* - DMA rankings can change; these rankings are based on data as of 2006.

## 2.2 Characteristics of the Target Audiences

Over-the-air households in general tend to be less affluent, with lower English literacy and more racial diversity than those that already have digital television, satellite or cable. As stated before, the following populations are likely to rely exclusively on over-the-air broadcasts:

- Minorities (African American, Asian, Hispanic, Native American)
- Rural
- Disabled
- Senior
- Low-income

To more clearly target appropriate partners and create media strategies, further analysis of the target populations is required. More detailed characteristics of each of these groups are given in Appendices C1 through C6. The summaries are based on 2007 MRI Doublebase data.

## 3. Campaign Execution

The core of the strategic approach is an integrated communications campaign that, at its foundation, is built on consistent messages and uniform materials. These messages and materials will be communicated and disseminated through the media and through partner organizations that are not only trusted by the target audiences but provide efficient and effective distribution of resources. The execution of the strategic approach is further detailed below.

### 3.1 Message and Material Development

The message and material development will include several key components, as follows:

- Initial program branding and consumer messaging;
- Development of other program resource materials, especially a repository of frequently asked questions and answers (FAQs);
- Maintenance of consistent messages across all Coupon Program materials;
- Distribution of materials to media and partners;
- Reinforcing the messages to the consumer over the phases of the program;
- Support of other external program communications related to the coupon program.

Each of these components is described in further detail below.

### 3.1.1 Initial Branding and Consumer Messages

The first task is to develop a library of core materials that communicate information about the Coupon Program that is both accurate and appropriate, and that the target audiences feel is clear and easy to understand. The materials will be culturally appropriate and address potential language and literacy issues some of the target consumers may face.

#### ***Draft Initial Messages***

To develop and refine the messages and materials, the team will develop:

- Program identity materials, such as the program logo and the overall program’s “look and feel.” These “branding” materials will help identify campaign materials as a trusted source for information about the Coupon Program. They will be imprinted on all hard copy and Internet materials which are part of the Coupon Program.
- Specific wording for various messages, such as:
  - information about the digital TV transition and when it will occur;
  - who will be affected;
  - the various options available to consumers;
  - the availability of coupons to defray the cost of an eligible converter box;
  - household eligibility rules and changes should the contingent funding be required;
  - instructions on how to apply for and use a coupon;
  - the scope and time limit of the coupon program;
  - coupon expiration date and replacement policy;
  - eligible converter boxes;
  - alerts about the potential for waste, fraud and abuse; and
  - the advantages that the converter box will offer.

The identity and branding materials will conform to internal design restrictions and be developed based on considerations of the vulnerable populations (i.e., font size for the visually impaired) and the potential uses for the brand. Based on these guidelines, the IBM/Ketchum team will draft multiple potential options and color palettes for NTIA review. A final group of three to five designs will be tested in a focus group setting.

#### ***Test and Refine the Messages***

Once the campaign identity, messages, and select materials have been developed, they will be tested with members of the various target populations in a series of 20 focus groups (and individual interviews, if necessary, to accommodate the vision and hearing impaired) to garner feedback from each vulnerable population. The focus groups will include seniors, minorities, people with disabilities, and low-income populations. These representatives from the target populations will help select and refine messages to ensure that all campaign messages and materials are culturally appropriate and easily understood across multiple audiences.

The intent is not to develop different messages for each target individual population, but to identify the messages that will resonate with all of the audiences. Therefore, word choice and phrasing will be thoroughly analyzed within each of the focus groups. Sample messages will be tested in focus groups to determine what words or phrases most clearly explain the information, what may confuse consumers and what motivates them to act. Through the research any words, phrases or concepts that are confusing to the audiences will be identified and information they feel is missing or information

that may motivate will be captured. Since segments of the message can be complicated, the research will be performed with individuals with low reading levels to rule out any language or phrasing that is not easily understood.

The IBM/Ketchum team will also seek input from appropriate partners on the effectiveness of the materials for their constituents. This input will help inform messages and the “look and feel” of the materials.

Final messages will be developed based on research findings and guidelines on how to use them will be made available to ensure message consistency throughout the campaign.

### ***Develop the Materials***

The results of the message testing will provide a base of content for most of our campaign materials. These messages will be incorporated into a set of materials for use by the media and the partners including fact sheets, FAQs, Web site copy, as well as the coupon application form which will be available to partners as a downloadable PDF. In addition, a partner toolkit will be developed to include, for example, a sample press release, newsletter article for print or web communications, brochure, fact sheet and PowerPoint presentation.

These materials will vary in their complexity, from the simplest image of a television set with the campaign slogan, toll-free number and Web address, to more detailed fact sheets containing information on how to obtain and redeem a coupon, how to find a certified retailer and other information.

Materials must be designed to be easily adapted to possible changes or developments in the Coupon Program. For example, if contingency funding becomes available, the campaign materials must be able to accommodate that messaging through a sticker or stamp that can be easily applied to existing brochures, posters, etc.

Materials will be produced in English and Spanish, however, partners will be encouraged to translate and produce materials in additional languages whenever possible. Where practical and appropriate, the materials will be designed to allow for partner customization. For example, posters will be designed with white space at the bottom for partners to write in dates and times for upcoming events; e-mail notifications will allow for partner branding to be included so it is clear who, in addition to NTIA, is sending and sponsoring the information. The result will be a library of user-friendly communication pieces and guidelines for use by partners.

The range of messaging will be refined or updated at key points throughout the campaign. Therefore, the IBM/Ketchum team will also draft preliminary messages and materials that will cover expected changes in the program, for example, if contingency funding becomes available or household eligibility changes, and when the program draws to a close. Further details on the anticipated additional messages are given later in this section.

The team will develop and provide a Creative Brief that will serve as a graphics standard guide. The Creative Brief will also provide direction on how and when to use the campaign brand identity and when and how to use messages. Since partners will disseminate Coupon Program information through materials that can be customized, the Creative Brief will provide general rules of use and additional contact information for specific questions. This document is intended for posting on the Web site and for partner use.

### 3.1.2 Frequently Asked Questions

In addition to developing materials targeted directly for consumers, the team will develop a set of Frequently Asked Questions (FAQs), covering a range of topics related to the Coupon Program. These FAQs will serve as to provide information about the program for the consumer. They will also serve as a repository of factual information for responding to media inquiries, as well as Congressional, GAO, OMB, and other official requests for information. The FAQs will also provide factual information to respond to requests from retailers and other stakeholders associated with the Coupon program or involved in the digital TV transition.

### 3.1.3 Disseminating the Messages and Materials

#### *Users of the Materials*

The messages and materials developed in the preceding steps will be distributed to consumers by three major groups:

- Members of the broadcast, online, and print media;
- Coupon Program partners;
- NTIA and the retailer and consumer facing components of the IBM Coupon Program team.

For partners, providing comprehensive, easy to access and customizable materials will facilitate and encourage participation. Members of the media will find campaign materials a quick reference for accurate information about the program, as well as a source of potential ideas for news stories. The IBM team will use the Creative Brief to refine the design of the retailer and consumer facing Web sites.

#### *Material Distribution Methods*

The funds originally proposed by the IBM/Ketchum team to produce and print various campaign materials (200,000 brochures; 50,000 posters; 1 million information cards and magnets) will be reserved for an equivalent activity as the campaign progresses. NTIA will provide limited initial printing of campaign materials (prior to IBM/Ketchum team campaign materials being finalized) and all materials will be available on the Coupon Web site. The table below shows the proposed distribution methods for the major materials as well as the targeted number of printed copies of each piece of material.

Material	Distribution Method	Quantity
One-page fact sheet to assist consumers in making a transition action decision (English and Spanish)	Various Specific Events conducted by NTIA	1,000,000
One-page fact sheet on the details of the coupon program (English and Spanish)	Various Specific Events conducted by NTIA	1,000,000
Event poster	Coupon Program Consumer Web Site (Partner page)	N/A
Print PSA for use and distribution by partners	Coupon Program Consumer Web Site (Partner page)	N/A
PSA script that can be read by broadcast outlet personalities	Coupon Program Consumer Web Site (Media page)	N/A
FAQs (consumer-oriented)	Coupon Program Consumer Web Site	N/A
FAQs (media-oriented)	NTIA Web Site (Media page)	N/A
FAQs (internal program use)	IBM Team Web Site	N/A

Material	Distribution Method	Quantity
FAQs (retailer-oriented)	Coupon Program Retailer Site	N/A
PowerPoint presentation to be given by partners	Coupon Program Consumer Web Site (Partner page)	N/A
Partner toolkit (to include materials above, plus materials specific to partner rallying points outlined in partner section, etc.)	Coupon Program Consumer Web Site (Partner page)	N/A
Press kit	NTIA Web Site (Media page)	N/A
Coupon Application	Coupon Program Consumer Web site (printed copies TBD)	N/A

A limited number of items will be printed in late 2007 and used by NTIA at speaking opportunities or exhibit booths which are currently scheduled. An initial limited print runs allows flexibility in case materials need to be changed later or if electronic materials prove to be preferred over printed ones. The IBM/Ketchum team will provide a recommended distribution plan in early 2008 based on feedback received at that point from partners. Electronic files of all materials will be made available to partners and they will be encouraged to print and distribute copies for their individual constituents.

### 3.1.4 Support for NTIA Message and Material Distribution

NTIA has an opportunity to raise awareness of the Coupon Program among consumers and intermediaries who interact with the target populations on a regular basis through planned activities, including public meetings, speaking opportunities, and response to press inquiries. The IBM/Ketchum team will coordinate closely with NTIA on these opportunities and anticipates providing support such as:

- Participate in strategic planning discussions to identify, coordinate and leverage outreach activity
- Coordinate media attendance and coverage of public meetings and other forums where educational information about the Coupon Program will be presented
- Secure NTIA opportunities to participate in partner events that are focusing on the Coupon Program and that reach target consumers or intermediaries
- Enlist partners in NTIA events where the partner’s specific knowledge or focus would enhance the forum

### 3.1.5 Modifying the Message Over Time

Message delivery will roll out in phases. Although it will be important to keep the Coupon Program consumer education messages consistent over time, certain messages will need greater emphasis at different points in the program. The Consumer Education campaign will be implemented in two broad phases: (1) Awareness/Educate; and (2) Action/Participate. Through the education phase, the messages will focus on the digital transition, what the coupon program is and why it exists, benefits of the digital transition and the converter box, options for consumers navigating the digital transition, and how to participate in the program if they chose to do so. As the campaign moves to the Action/Participate phase, message emphasis will shift. While basic program information will continue to be communicated, the tone will become more urgent and more direct. The table below shows a preliminary recommendation as to which messages should receive primary and secondary emphasis during each of these two phases; this information is expected to be updated.

<b>Awareness/Educate Phase</b> October 1, 2007 – March 31, 2008	<b>Action/Participate Phase</b> April 1, 2008 – March 31, 2009
<b>Primary:</b> If you have an analog television, your TV will not work after Feb 17, 2009 unless you take action.	<b>Primary:</b> You will not be able to watch TV on your analog TV after Feb. 17, 2009 if you do not take action.
<b>Primary:</b> Consumers affected by the digital transition have 3 options: digital TV, cable/satellite, converter box.	<b>Primary:</b> Consumers with analog TVs must buy a converter box, buy a TV with a digital tuner, or connect to cable/satellite to keep watching their TV after Feb. 17, 2009.
<b>Primary:</b> A converter box is a one-time cost so there are no monthly charges, and the Federal government is offering up to two \$40 coupons to each U.S. household to defray the cost of a converter box	<b>Primary:</b> A converter box is a one-time cost so there are no monthly charges, and the Federal government is offering up to two \$40 coupons to each household to defray the cost of a converter box.
<b>Secondary:</b> Coupons will be distributed starting in date TBD	
<b>Secondary:</b> Starting January 1, 2008 consumers can apply for coupons by calling 1-888-DTV-2009, visiting <a href="http://www.DTV2009.gov">www.DTV2009.gov</a> , mailing an application to P O Box 2000, Portland, OR 97208, or faxing 1-877-DTV4ME2.	<b>Primary:</b> Apply for coupons by calling 1-888-DTV-2009, visiting <a href="http://www.DTV2009.gov">www.DTV2009.gov</a> , mailing an application to P O Box 2000, Portland, OR 97208, or faxing 1-877-DTV4ME2.
<b>Secondary:</b> Coupons will expire after 90 days, and cannot be re-issued or replaced for any reason.	<b>Primary:</b> Don't delay in using coupons. Coupons will expire after 90 days, and cannot be re-issued or replaced for any reason.
<b>Secondary:</b> A limited number of coupons are available.	<b>Primary:</b> A limited number of coupons are available on a first come, first served basis.
	<b>Secondary:</b> Coupons will only be available through March 31, 2009.
	<b>Secondary:</b> Using an analog to digital converter box can improve the picture quality of existing analog TVs and offer more programming, while extending the life of the existing TV.

In addition to these changes in the emphasis of the messaging as the campaign transitions from the Awareness/Educate phase to the Action/Participate phase there may also be a need for additional messages and possibly limited additional materials at the following points in the process:

- When (if) the contingency funding begins;
- When we are getting close to February 17, 2009;
- When the time period for coupon requests is coming to an end on March 31, 2009;
- If there is a crisis;
- For the period directly following March 31, 2009 until July 10, 2009, the last day coupons can be redeemed.

The emphasis of the messages will be determined by the NTIA/IBM team, but the delivery of the messages will be carried out through the media and the partners. Ensuring that these messages are heard and understood by consumers will require coordinating with a large number of media and partners who have the ability to deliver them through a broad spectrum of channels. Detailed plans for working with media and partners are described in the next section of this plan.

### 3.1.5.1 Contingency Period

Since coupons may no longer be available for some if contingency funding is implemented, consumers should at minimum understand that coupon supplies may be limited. The IBM/Ketchum team will continually monitor coupon requests and redemption. If it appears that program base funds will be committed, the team will start more direct education efforts on program changes by distributing specific information about the contingency phase to the media and key partners. The team will analyze redemption data to determine where coupons have been requested and redeemed to pinpoint areas of the country with high OTA populations and low coupon request and redemption. Subsequent outreach will be targeted to those areas to ensure that households are fully aware of coupon availability. The specific outreach tactics for the contingency phase will vary depending on the closeness to February 17, 2009; if timing is appropriate, we will attempt to coordinate with the broadcasters final 100 days campaign. Regardless, outreach to those populations will include efforts such as:

- Alerting partners and encouraging immediate distribution of contingency phase messages and materials;
- Producing a one-page fact sheet explaining the contingency phase and emphasizing who is eligible to receive coupons in this phase; and
- Conducting regular media telebriefings and other proactive media outreach to inform the public on progress toward contingency phase.

### 3.1.5.2 Issues and Crisis Management Support

The IBM/Ketchum team strongly recommends preparing in advance for issues or crises that may arise around the Coupon Program. It is critical to the success of the program to prepare rational strategies preemptively before faced with the time pressure and public scrutiny once an issue or crisis situation occurs. Being prepared calls for conducting a thorough communications planning process in advance to deal with issues that may develop such as potential delays in coupon fulfillment; barriers to converter box installation; or fraud and coupon abuse. The IBM/Ketchum team recommends a planning process that includes the following elements:

- Conduct half day scenario planning session with NTIA and IBM/Ketchum team members. The session will begin as a brainstorm to identify any real and potential vulnerability, and will build on the existing identified risks. The vulnerabilities will then be prioritized, first examining which of them would require messaging or communications outreach. Finally, draft questions and key points to answer those questions will be prepared for highly vulnerable scenarios.
- Participate in monthly communications planning meetings to discuss key pieces of information that should be communicated to consumers, or misinformation that needs to be dispelled, at that specific point in time.

- Engage issues and crisis team to support communication and messaging response as needed, to include:
  - Strategic counsel
  - Media relations
  - Message development
  - Third-party spokesperson recruitment
  - Media/Internet monitoring and/or Web site management

### 3.1.6 Non-Consumer Education Communication and Messages

As an integral member of the NTIA/IBM team tasked with development and implementation of the consumer education program, Ketchum will work closely with the IBM program director to ensure that we provide the highest quality performance and products. Working collaboratively with the greater IBM team, Ketchum will:

- Participate in weekly team integration meetings and other scheduled or unscheduled meetings with IBM team;
- Participate in weekly IBM/Consumer Ed “deep dive” meetings;
- Review dashboard data weekly at minimum;
- Provide updates on trends in the media;
- Solicit updates on retail education, coupon up-take, trends in data, etc.;
- Participate in monthly meetings including PMR’s, message discussions and risk management discussions;
- Support the program’s external communications program, including support for message direction, and proactive attention to Congressional, GAO, and other inquiries.

These activities are further described in the program’s overall communications plan.

## 3.2 Media Outreach

In order to reach consumers with Coupon Program messages, the IBM/Ketchum team will work primarily with the broadcast media – especially television – as well as other media channels such as radio, print, and online news services as the primary means of communication. Leveraging “earned media,” or stories written by journalists, rather than “paid media” or advertising, to educate consumers about the converter box coupon program does not allow for guaranteed placements, but it does offer key benefits for NTIA: an increased level of credibility and trust with the consumer; an avenue to disseminate information quickly if the need arises; and effective use of the available resources.

Earned media tactics will include efforts to reach the entire U.S. population, but will be more heavily focused on those markets designated as “red” or high intensity on the geographic breakdown of DMAs.

Beginning in June 2008, the team will review coupon application and redemption data at least monthly to help identify additional areas of the country where analog OTA households are high, but coupon applications seem to be low in comparison. The team will take into account the fact that redemption rates may be low due to market forces, for example if digital television or cable subscribership costs drop that will have an impact on consumers’ decision whether or not to choose a converter box for an existing analog TV set. An ongoing analysis of local and regional coupon requests will help to inform

outreach efforts to local reporters and media in specific areas of the United States where requests are lagging.

Mirroring the overarching strategy, media outreach will occur in two phases – education and participation. The broadcast and cable industries are already educating consumers about the digital transition. However, unlike buying a digital television or subscribing to cable or satellite services, consumers cannot yet take action to participate in the Coupon Program. Therefore, the media plan will have less activity in the education phase and the majority of effort occurring in the participation phase. The two phases are as follows:

- Education Phase will run from September 2007 through March 2008. The primary goal in this phase is to provide the media with background information about the program and to educate consumers about the program generally. This will set the stage for the Participation Phase which begins April 2008.
- The Participation Phase will run from April 2008 through July 2009. The goal during this phase is to continue to emphasize the options available to the consumer, let them know they must act, and that coupons are available. The urgency of the message will increase closer to February 2009.

### 3.2.1 Identify Target Media Outlets

To identify the specific media targets, a database of media contacts (including both organizations and individuals) will be developed to include organizations that fall into three broad categories: (1) national media; (2) geographically-oriented media; and (3) demographically targeted media. The IBM/Ketchum team will identify reporters within each news organization most likely to cover this issue, such as those focused on consumers, news and technology. Media stories about the digital television transition and the coupon program will be reviewed and analyzed to identify trends in coverage and additional reporters and/or publications most likely to help disseminate information about the digital transition and the coupon program. Since media employees move from job to job frequently, these lists will be reviewed quarterly at minimum to remain as up-to-date as possible.

The organizations to be targeted in each of the broad categories are described below.

***National Media.*** From a national media perspective, the key organizations to be targeted will include:

- National broadcast networks (morning shows and nightly news)
- National radio
- Cable networks
- Talk shows/news magazines
- National News weeklies
- National Sunday supplements
- Wire services
- On-line outlets
- Magazines
- Industry trade publications

***Geographically Targeted Media.*** High-OTA markets and OTA markets with disproportionate numbers of target populations, such as Hispanics and seniors (see section 2.1) will be targeted through:

- Local TV and radio stations

- Major daily newspapers

***Demographically-Targeted Media.*** Vulnerable populations will be reached through the general outreach outlined above. However, an additional layer of media outreach will be targeted to each of the vulnerable populations based on the media habits and preferences of the individual population (see appendix Target Audience Profiles for detailed data), such as publications targeted at seniors, African-Americans, etc.

### 3.2.2 Identify Appropriate Tactics

There are numerous tactics that can be leveraged to encourage coverage of a story. The following is a list of media tools that will likely be used throughout the campaign to generate media coverage of the Coupon Program.

- **Satellite media tour:** A satellite media tour (SMT) is a series of back-to-back television interviews of an NTIA spokesperson at a central location conducted by any number of television broadcast outlets around the country. Normally, each SMT interview is three to four minutes in length, with approximately five to seven television interviews conducted per hour.
- **Radio media tour:** A radio media tour (RMT) is a series of back-to-back radio interviews of an NTIA spokesperson at a central location conducted by any number of radio stations and/or networks over the span of a few hours. Radio interviews are typically blocked in ten-minute increments, allowing for approximately six scheduled interviews per hour.
- **Matte release:** A matte release is a formatted, consumer-related article provided to an approved vendor for distribution to key newspapers across the country. Newspaper editors normally use matte releases to supplement staff-written stories to fill soft news sections of the paper.
- **Telebriefing:** A telebriefing is a briefing conducted via phone with any number of invited media from news organizations. Telebriefings normally last approximately 45 minutes to an hour in length. Telebriefings allow for a controlled environment where a spokesperson can speak on a designated topic and then open up the phone lines for questions from attending media.
- **Proactive, fractured media outreach:** Proactive, fractured media outreach focus on targeted, segment outreach to be conducted to media outlets that are preferred by NTIA's key audiences. This outreach requires providing a story angle to a reporter and following up to help secure a written or broadcast news story. This method of outreach provides opportunities to get key messages into stories written by media outlets that will reach the target audiences.
- **Backgrounder Briefings/Editorial Board Briefings:** A background briefing allows a spokesperson to meet with staff writers at major news outlets and provide information and context for a major news story or issue. Editorial writers approach editorial board meetings as a way to evaluate the issue brought to them, decide if the issue warrants editorial support, and, if so, determine the newspaper's position. Meetings do not always result in coverage or an editorial. However, these meetings may allow for the development of an eventual features piece, a guest editorial or a letter to the editor in lieu of a stand-alone editorial.
- **Op eds/Letters to the Editor:** Op eds, the abbreviation for opinions editorials, normally appear opposite a newspaper's editorial page. The length of an op-ed is regulated by each newspaper; however, in general, an op-ed should be approximately 600 words in length. Newspapers processing of the op-ed can take up to four weeks, unless the topic is considered a "hot" news item. A letter to the editor is written for and sent to a newspaper or magazine to present an organization's position, make a correction or respond to another story or letter written. Print publications generally prefer letters to the editor be 150 to 200 words in length. Before publishing a letter to the editor, newspapers confirm the author's approval of content of letter by place a

phone call. It is important to note that print publications reserve the right to omit parts of the content submitted in an opinion editorial or letter to the editor.

- **Public Service Announcements:** A public service announcement (PSA) is a print, radio or television announcement that a media outlet puts out at no charge. A PSA promotes programs, activities or services of a federal, state or local government, a non-profit organization, or another group serving the community interests. PSAs are submitted to the PSA director of each individual media organization and are aired at the discretion of the organization who receives them.
- **On-line chats and viral e-mails:** An on-line chat allows a spokesperson to provide information and respond to questions via electronic means. Most are guided by a reporter asking questions, and likely opening the discussion to consumer questions that are submitted via e-mail or some type of instant messaging. A viral e-mail allows for less interaction. An e-mail is sent to potentially interested parties and then forwarded to friends, family, co-workers or others who the recipient feels may be interested in the information.

### 3.2.3 Execute Outreach

Executing an earned media program requires marrying the target media markets with the most appropriate tools to reach the greatest number of consumers in our target populations. One of the benefits of earned media is that it can be far-reaching, hitting millions of viewers, readers or listeners. However, that also means who sees the information and who does not cannot be dictated. A message intended for one audience will likely be seen by others. Therefore, while each of our target populations are unique, basic information about the coupon program (from how it works to its benefits) remains the same and the timeframe in which we communicate it must also remain consistent due to potential crossover. However, unique angles can also be offered to media that are geared toward our target populations.

Combining the information that needs to be communicated to all populations along with the media preferences of the vulnerable populations, requires a dual track media strategy.

- Identify story topics and tools that will be distributed widely to all of our target audiences (both demographically and geographically-focused).
- Identify select, specific media outreach for each of our vulnerable population audiences (demographically-focused).

On a quarterly basis, the team will develop a specific three-month media plan that marries the proposed topic with the appropriate tool for each track of the media strategy. These periodic plans will help to attain campaign objectives by allowing careful targeting to changes in the media environment, updated awareness tracking information and coupon application and redemption data.

While the media plans will be developed in detail, the sections below provide an overview of the media strategy:

#### 3.2.3.1 National/Geographically-Based Efforts

As noted earlier, the information communicated about the coupon program – from how it works to its benefits – will be the same for every population in the Coupon Program outreach. The benefit of many of the mainstream media outlets is that they reach more than one of the target populations and general consumers who may have one analog television in their home or have a friend or family member that may be OTA only.

All outreach described in this section will be offered to both the national media and the geographically-focused media outlets listed earlier. Results from DTV transition awareness tracking surveys, coupon application data and coupon redemption data on a monthly basis will shape the quarterly media plans and provide a high degree of specificity when targeting messages to key populations.

Because consumers may not take the time to, or may not know to, seek out information about the Coupon Program it is critical for the IBM/Ketchum team to ensure that information is incorporated into those stories where the consumer will most likely hear about the program. For example, the target audience data indicates much of the OTA population includes a high percentage of consumers who use their televisions for news, sports and entertainment programming. Therefore each quarterly media plan will include scheduled background briefings with each of these media subsets – news reporters, sports journalists/broadcasters and entertainment journalists/broadcasters highlighting the role they can play in educating their viewers about the Coupon Program

### ***Education Phase***

Media outreach conducted in this phase will be used to begin to educate consumers and the media about the coupon program. The initial success in this phase will rely less on the number of stories written and more on the range of media outlets engaged in the digital transition and coupon program discussion. Later in this phase (January – March 2008), when consumers can take action to participate in the Coupon Program, the focus will shift to getting stories out in front of the consumer. While outreach during this period will clearly indicate the benefits of participating in the Coupon Program immediately, and encourage that action, the team does not anticipate a high rate of coupon application and redemption until later in the year.

During the Education Phase, the media plan will rely more heavily on briefing a wider variety of reporters and media outlets and educating the consumer about the basics of the Coupon Program and its benefits.

### ***Participation Phase***

During the shift in outreach efforts from an educational focus to one on participation in the Coupon Program, the team anticipates that the partners will become engaged in more activity around the program which will provide more opportunities for media involvement and coverage. The team will support the partners by developing media interest in their activities and expanding the impact of the partner events to garner media results. At this point in time incoming data on coupon application and redemption data per market will help to define more specifically the geographic areas of focus where media outreach efforts will be targeted. More detailed plans will be submitted quarterly.

#### **3.2.3.2 Demographically-Based Efforts**

In order to reach the demographically-based media the team will establish a media task force with associations that represent the African American, Hispanic, Asian and Native American journalists, as well as with representatives from other target populations. The task force members will be briefed on news and information about the coupon program that specifically relates to the populations for whom they are writing, as well as coverage ideas that may be of particular interest to the consumers of their outlet. For example, the team plans to work with the 2008 UNITY conference, which will be held July 23 – 27, 2008 in Chicago, to host a town hall meeting prior to or at the conference regarding the digital television transition and the coupon program. UNITY: Journalists of Color, Inc., is a national coalition of the Asian American Journalists Association (AAJA), the National Association of Black Journalists

(NABJ), the National Association of Hispanic Journalists (NAHJ) and the Native American Journalists Association (NAJA) representing more than 10,000 journalists of color. Similar town hall meetings have attracted approximately 250 journalists, community & business leaders, and residents from the local area.

Following are earned media outreach efforts which will provide additional points of contact with the most vulnerable OTA populations through their most accessed and trusted communication channels. These suggestions will be incorporated into the quarterly earned media plans with additional detail.

#### ***African American Specific Media Outreach***

Based on media preferences data, urban radio rates high the African American population as do several

long-lead publications, as well. The team will conduct the following additional outreach to increase information dissemination among the African American audiences.

- Pitch a series of stories on the transition and coupon program to American Urban Radio Network and Black Radio Network.
- Pitch guest interviews and a DTV Transition quiz to the Russ Parr Morning Show and the Tom Joyner Morning Show.
- Offer a graphic highlighting the potential impact of the digital transition to the African American community to *Ebony*, *Jet*, *Essence* and *Vibe* magazines, as well as their online counterparts; also provide these publications with the DTV Transition quiz to help their readers understand the transition and what choices they have to make.

#### ***Hispanic Specific Media Outreach***

The fact that forty percent of Hispanic consumers rate television as their most trusted media source and 25 percent site Noticiero on Univision one of their top television programs, means the consumer education efforts outlined by Univision will dramatically increase awareness among the Hispanic community. While readership of newspapers is low, 52 percent of Hispanic consumers listen to Hispanic radio. Therefore, the following additional earned media efforts will be used to reach the Hispanic population:

- Work with Clear Channel/Radio Unica/CNN Radio en Espanol to tape a radio Public Service Announcement featuring Commerce Secretary Carlos Gutierrez or Assistant Secretary Josefina Carbonell
- Pitch a series of stories on the transition and coupon program on Univision's Primer Impacto and Telemundo's Noticiero Telemundo
- Pitch a series of stories on the transition and coupon program in key Univision Radio Network markets such as Los Angeles, New York City, Chicago, Puerto Rico, and Miami
- Pitch guest interviews on Univision's Despierta America and Telemundo's Cada Dia Con Maria Antonietta
- Offer a graphic highlighting the potential impact of the digital transition to the Hispanic community to People En Espanol, Selecciones, Latina and Ser Padres
- Engage Univision news co-anchors such as Jorge Ramos and Maria Elena Salinas (average audience of 1,057,000 viewers) as Coupon Program ambassadors to the Hispanic community

#### ***Native American Specific Media Outreach***

While not necessarily home access, there is a high percentage of this population that has access to the internet. They also rely on both television and newspapers equally to keep them informed. Therefore,

targeting print publications that also have an on-line component will help increase reach into this population.

- Pitch a graphic or specific data points on the transitions effect on Native American's to Native American Times and Indian Country Today newspapers and websites.
- Conduct a podcast on Indian Country *In Depth*, monthly discussions on a topic of the day.
- Schedule a call-in segment on Native America Calling, a syndicated radio program started by the Koahnic Broadcast Corp, that would allow listeners to have a dialogue with an NTIA spokesperson about the coupon program.

#### ***Asian American/Pacific Islander Specific Media Outreach***

Asian Americans/Pacific Islanders indicate that their most trusted news source is the Internet (30%) and they have a high rate of access to it. A good portion of the Asian population is reached through mainstream media, due in part to the concentration of Asian American and Pacific Islanders (nearly 50 percent) in five large geographic areas: Los Angeles, San Francisco, New York, Sacramento and Honolulu. Therefore efforts targeted to these cities will increase reach to this population. We will conduct the following additional outreach to increase information dissemination among the Asian American/Pacific Islander audiences.

- Pitch a series of guest columns on the digital transition to all regional World Journal newspapers.
- Conduct outreach to the online Web site of AsianWeek to write feature story on the potential transition impact on the Asian community
- Partner with KTSF Television to engage well-known Asian broadcasters to develop television and radio PSAs

#### ***Rural Specific Media Outreach***

Rural OTA consumers use both television and newspapers to keep them informed. They are also heavy consumers of country music radio. Outlets targeted to this population will likely have the greatest spill-over to the general population. Regardless, the following efforts will be made to reach the rural population through media.

- Pitch guest interviews and a series of stories on the transition and coupon program to RFD-TV, the nation's first 24-hour television network dedicated to serving the needs and interests of rural America and agriculture.
- Offer a Q&A interview format story highlighting the potential impact of the digital transition to the rural community to Acreage, Ranch & Rural Living, Grit, and Rural Life.
- Tape and distribute a radio Public Service Announcement through the Country Radio Broadcasters (CRB) to air on programs like ABC's Real Country, The Back Porch Show and The Big Show

#### ***Senior Specific Media Outreach***

Seniors rely heavily on both television and newspapers to keep them informed. They are also one of the few populations where a trade magazine directed at the audience ranks as one of the top read publications (AARP Magazine). Retirement Living TV's efforts, along with the local broadcasters, will help reach this population through television. The majority of our senior specific outreach will be directed to print outlets and includes:

- Work with AARP on a series of articles that take readers through the education and participation phases.

- Identify a “senior spokesperson” to write a regular column or diary about his or her efforts in navigating the digital television transition for distribution through senior newspapers (i.e., Senior Beacon, etc.)
- Prepare a “Letter from the Secretary” that discusses the specific concerns for seniors in navigating the digital television transition and outlining the help that is available for this population for placement in senior focused newspapers and magazines (i.e., Boomer Times, Senior Living, etc.).

### ***Disabled Specific Media Outreach***

This population, more than any other, will need to receive media communications through sources that are proven accessible to the deaf, blind and deaf-blind communities. National magazines and newsletters, targeted radio outlets and on-line networks will provide more direct access to the disabled community in a format that is accessible to them. The following efforts will be focused on reaching the disabled populations:

- A series of interviews discussing the transition and accessibility concerns to key radio outlets including Disabilitynewsradio.com, Radio Independent Living and On a Roll radio
- Provide a demo to both deaf and blind consumers and pitch testimonials to print outlets such as Ability, Deaf Times and Odyssey
- Post information to the NFB-BPJ, a discussion list for blind journalists, to encourage coverage of the transition and the coupon program.

## **3.3 Partnership Development**

A network of committed partners who already have access to and are trusted by the program’s target populations will be engaged to serve as trusted channels to these hard-to-reach audiences. Where needed, these partners have the potential to help targeted vulnerable populations take the action necessary to apply for a coupon and redeem it.

Partners will be engaged for both a “top-down” and “bottom-up” strategy. “Top-down” partners will primarily include national organizations who can reach the program’s target audiences through their national network of members, chapters or affiliates, but who may also choose to support the Coupon Program efforts as spokespersons or supporters. “Bottom-up” partners are equally important as organizations that have deep on-the-ground connections in a local or regional area. These partners are critical in geographically hard-to-reach but high OTA areas of the country. Their on-the-ground activities and events provide key venues to disseminate messages in these areas. As an example, the Boise, Idaho Elks Lodge may be enlisted to hold a series of coupon application completion support days specifically for the Boise community.

Initially the “bottom-up” strategy will target markets with the highest percentage of analog OTA households: Salt Lake City, UT; El Paso/Las Cruces, TX; Boise, ID; Fairbanks, AK; McAllen/Brownsville/Harlingen/Weslaco, TX. Beginning in June 2008, as coupon application and redemption data becomes available monthly, the “bottom-up” strategy may refocus on other areas of the country where analog OTA households are high, but coupon applications continue to be low in comparison. Based on this information, additional local partners will be engaged to support the consumer education efforts.

The partnership program will be executed as follows:

### 3.3.1 Understand current partner landscape

Activity surrounding the digital television transition is well underway by many organizations. As a first step, the team is conducting a review of existing activity or plans by associations, community based organizations, broadcasters, Federal agencies and other key stakeholders to ensure coordination, not duplication, of activity. Once a good understanding of the current level of activity is obtained, the team will identify target partners not currently engaged in the DTV transition Coupon Program effort that may be able to fill in perceived gaps in target audience penetration.

While much of this work will be done in fall 2007, engaging new partners will remain an ongoing effort. As additional stakeholders begin their own education efforts, the IBM/Ketchum team efforts will change to reflect those new activities. For example, at this point in time little is confirmed about which retailers will participate in the program and how they will conduct their own consumer education efforts through their stores, advertising or other commonly used communication channels. Should a retailer determine they would like to make special efforts to reach the senior population, for example, we will re-evaluate our outreach efforts potentially scaling back resources from this particular population to focus more heavily on a population that has less support.

### 3.3.2 Develop tiered partner system and identify potential partners

The level of commitment and support partners will be able to offer will vary due to a number of factors. In evaluating potential partners, we will look to organizations that have an existing link to or interest in the issue. For example, the National Association of Counties not only reaches into all counties across the U.S., they also have a subcommittee on telecommunications and technology that has already posted a fact sheet about the DTV transition on its Web site and has joined the DTV Transition Coalition. We will also look at the resources the organization has available to support the effort and their potential reach (national, regional, local, etc.).

Because of the large number of potential organizations who may be involved with the coupon program and the limited resources available, the team is proposing a tiered partner system based on potential impact and communication capabilities of the partner. This type of system helps to ensure that efforts are focused appropriately on those organizations that can offer the most beneficial support, all organizations willing to volunteer can participate, and organizations conducting consumer education will be informed and provided with consistent messaging and materials.

Following are three tiers of partner support:

- Tier 1: A Tier 1 partner is a national organization that has the ability to reach the Coupon Program's target populations in most of the areas of the country where they reside. The organization is influential with a deep stake in the DTV transition process. They primarily offer "top-down" support.
- Tier 2: A Tier 2 partner is regional or local organization that is influential in reaching one or more of the targeted vulnerable populations. The organization has the ability and resources to conduct on-the-ground activities supporting the program's "bottom-up" strategy.
- Tier 3: A Tier 3 partner includes any organization that has expressed an interest in disseminating materials and notifying constituencies, but may have little relation to the key target audiences or issue. The organization may only have reach in a single city or town, but is willing to support program efforts.

The differences in Tier 1 and Tier 2 partners will primarily be the approach they offer. Tier 1 partners will be most beneficial in supporting a “top-down” outreach strategy. These are organizations that, due to their national presence, can push information out to their chapters and affiliates, and in some cases, the target populations directly reaching “the masses.” Tier 2 partners will more directly support the “bottom-up” approach. These organizations are working on the ground in a specific area and have the ability to interact directly with our target populations. Tier 3 partners will include any organization interested in spreading information about the converter box coupon program; we will want to make sure that these organizations have the information needed to educate consumers.

The team will work with NTIA to tier the current list of partners who have proactively or reactively been contacted. Any additional partners identified or who seek out the program will be evaluated to determine the appropriate level of interaction.

At this time, the following organizations have been identified as potential Tier 1 partners for each target population. Based on previous experience, the team will approach a number of organizations that have the potential to be a Tier 1 partner (as outlined below).

Partner Categories	Proposed Tier 1 Partners
National Overreaching Partners	<ul style="list-style-type: none"> <li>▪ AFL-CIO</li> <li>▪ American Library Association</li> <li>▪ American Federation of State, County, and Municipal Employees</li> <li>▪ Consumers Union</li> <li>▪ General Federation of Women’s Clubs</li> <li>▪ Leadership Conference on Civil Rights</li> <li>▪ National Education Association</li> </ul>
State and Local Government	<ul style="list-style-type: none"> <li>▪ Council of State Governments</li> <li>▪ Council of Latino Mayors</li> <li>▪ Conference of Black Mayors</li> <li>▪ National Association of Counties (NACO)</li> <li>▪ National Association of Latino Elected and Appointed Officials</li> <li>▪ National Association of Telecommunications Officers and Advisors (NATOA)</li> <li>▪ National Council for State Legislatures</li> <li>▪ National League of Cities</li> <li>▪ US Conference of Mayors</li> </ul>
Industry	<ul style="list-style-type: none"> <li>▪ Association of Public Television Stations (APTS)</li> <li>▪ Consumer Electronics Association (CEA)</li> <li>▪ DTV Transition Coalition</li> <li>▪ National Association of Broadcasters</li> <li>▪ National Cable and Telecommunications Association (NCTA)</li> <li>▪ Promax International</li> <li>▪ Radio Television News Directors Association (RTNDA)</li> <li>▪ ABC</li> </ul>

Partner Categories	Proposed Tier 1 Partners
	<ul style="list-style-type: none"> <li>▪ NBC</li> <li>▪ CBS</li> <li>▪ FOX</li> <li>▪ Univision</li> </ul>
Media	<ul style="list-style-type: none"> <li>▪ Asian American Journalists Association (AAJA)</li> <li>▪ Asian Media Access</li> <li>▪ Hispanic Communication Network</li> <li>▪ Koahnic Broadcast Corporation (Native Americans)</li> <li>▪ National Association of Black Journalists (NABJ)</li> <li>▪ National Association of Black Owned Broadcasters</li> <li>▪ National Association of Hispanic Journalists (NAHJ)</li> <li>▪ Native American Journalists Association (NAJA)</li> <li>▪ NBC Weather Plus</li> </ul>
African American	<ul style="list-style-type: none"> <li>▪ NAACP</li> <li>▪ National Caucus and Center on Black Aged, Inc.</li> <li>▪ National Council of Negro Women</li> <li>▪ National Urban League</li> </ul>
Hispanic	<ul style="list-style-type: none"> <li>▪ National Council of La Raza (NCLR)</li> <li>▪ National Hispanic Caucus Institute</li> <li>▪ National Hispanic Council on Aging</li> <li>▪ United States Hispanic Chamber of Commerce</li> </ul>
Asian American/ Pacific Islander	<ul style="list-style-type: none"> <li>▪ Asian/Pacific American Librarians Association</li> <li>▪ The Federal Asian Pacific American Council</li> <li>▪ National Asian Pacific Center on Aging (NAPCA)</li> </ul>
American Indians / Alaska Natives	<ul style="list-style-type: none"> <li>▪ American Indian Library Association</li> <li>▪ Alaskan Federation of Natives</li> <li>▪ Association on American Indian Affairs (AAIA)</li> <li>▪ National Congress of American Indians</li> <li>▪ National Indian Council on Aging, Inc. (NICOA)</li> </ul>
Seniors	<ul style="list-style-type: none"> <li>▪ AARP</li> <li>▪ Leadership Council of Aging Organizations</li> <li>▪ National Association for Area Agencies on Aging (N4A)</li> <li>▪ National Council on Aging</li> </ul>
Rural	<ul style="list-style-type: none"> <li>▪ American Farm Bureau Federation</li> <li>▪ National Association of Rural Health Clinics</li> <li>▪ National Farmers Organization</li> <li>▪ National Farmers Union</li> <li>▪ The National Grange</li> </ul>

Partner Categories	Proposed Tier 1 Partners
People with Disabilities	<ul style="list-style-type: none"> <li>■ American Association of People with Disabilities</li> <li>■ National Association of the Deaf</li> <li>■ American Council of the Blind</li> <li>■ Coalition of Organizations for Accessible Technology</li> </ul>
Low-income/Economically Disadvantaged	<ul style="list-style-type: none"> <li>■ Catholic Charities</li> <li>■ Community Action Partnership</li> <li>■ Goodwill</li> <li>■ The Salvation Army</li> <li>■ YMCA</li> </ul>
Federal	<ul style="list-style-type: none"> <li>■ Department of Health &amp; Human Services                             <ul style="list-style-type: none"> <li>– Administration on Aging</li> <li>– Administration for Children and Families Office of Community Services – includes National Association for State Community Services Programs</li> </ul> </li> <li>■ Department of Agriculture                             <ul style="list-style-type: none"> <li>– USDA Rural Development Centers</li> <li>– USDA Food and Nutrition Services</li> <li>– 4-H Council Community Service</li> </ul> </li> <li>■ Department of Defense                             <ul style="list-style-type: none"> <li>– Veterans Affairs</li> </ul> </li> <li>■ Department of Education                             <ul style="list-style-type: none"> <li>– Office of Faith-Based and Community Initiatives</li> </ul> </li> <li>■ Federal Communications Commission</li> <li>■ Social Security Administration</li> </ul>
Community Service	<ul style="list-style-type: none"> <li>■ AmeriCorps</li> <li>■ Boy Scouts/Girl Scouts of America</li> <li>■ Family, Career and Community Leaders of America</li> <li>■ National 4-H Council</li> </ul>

### 3.3.2.1 Broadcasters as partners

Television broadcasters, particularly the four major networks (ABC, CBS, NBC, FOX), have a particularly high stake in educating consumers about the digital transition as they stand to lose millions of viewers if consumers can not watch their TVs. The team will further the relationship with the National Association of Broadcasters, tapping into their efforts as appropriate to ensure that information is conveyed to viewers about the Coupon Program, driving them to use the NTIA toll-free number or go to [www.DTV2009.gov](http://www.DTV2009.gov) for more information. Other opportunities might include, providing members of the NAB speaker’s bureau with information about the coupon program to incorporate into speeches, or providing coupon program materials to NAB for distribution to local broadcast outlets and seeking opportunities for NTIA spokespeople to speak about the Coupon Program in broadcast news and lifestyle programming

However additional activities can be undertaken by the broadcast networks to emphasize the program to the target populations and the country as a whole. The team will consult with NAB to encourage the networks to take on activities such as, but not limited to, the following:

- Produce and air PSAs starting a variety of network talent (i.e., top three or four entertainment personalities per demographic, older and newer faces of television journalism, etc.)
- Commentator discussion and PSAs during the Super Bowl, March Madness, World Series, Thanksgiving Day parade, Christmas parade, and other television events with high viewership
- Run a crawl about the Coupon Program in highly rated television programming
- Produce “road block” programming where all stations owned by a network aired programming about the transition at the same time
- Feature information on non-broadcast, public properties (i.e., Jumbo-tron in Times Square, display on the history of television in Rockefeller Plaza, billboards, etc.)
- Incorporate information into appropriate entertainment programming and storylines (i.e., Price is Right, Wheel of Fortune, Jeopardy, Chuck, Back to You, daytime soap operas, etc.)
- Devote a monthly segment on the evening news to the digital broadcasting transition
- Make all networks develop website page with digital transition content
- Focus philanthropy efforts on the issue; for example a "CBS Cares Day" on the issue having a Converter **Box Service** day, where participants go out into the community and do converter box demos and coupon application assistance for seniors, disabled, etc.

### 3.3.2.2 Federal Agencies/U.S. Government as a Partner

Government agencies are natural partners for this effort, not only because the Coupon Program is a Federal program, but more importantly because many of the Federal agencies have existing communication channels to some of the most vulnerable populations that need to be reached. Working with NTIA, the team will contact Federal colleagues and propose outreach efforts that may be conducted by Federal agency partners. These efforts will attempt to use existing communications methods and channels in an effort to conduct outreach easily and efficiently. Initial outreach recommendations include:

- Department of Health & Human Services (HHS), Administration on Aging: utilize Elder Care Locator to connect seniors with local support for coupon application and redemption; engage the Senior Medicare Patrol to identify potential fraud; distribute information through Home Delivered Meals Program and the 238 Tribal Agencies the AOA works with; propose Assistant Secretary to serve as a spokesperson for the senior population and Hispanic community.
- HHS, Administration for Children and Families: distribute information to populations through the Office of Community Services local social service agencies and the Office of Refugee Resettlement state refugee coordinators and Mutual Assistance Associations.
- U.S. Department of Agriculture: Distribute information to rural populations by providing flyers and e-mail updates, as well as content for existing publications, to the Rural Development Centers, Food and Nutrition Services, Food Stamp Program and Farm Services
- U.S. Department of Veterans Affairs: Include information in internal publications and educate employees who interface with veterans directly; coordinate information distribution to the Veteran Services Organizations; distribute Coupon Program information through the county and state intergovernmental offices to ensure that the message is effectively communicated at the state and

local level; utilize Veteran's media outlets including VA News, television programming available in hospitals and clinics.

- Department of Commerce, Census Bureau: request information be distributed in mailings of the 2008 American Community Survey and Puerto Rico Community Survey; train 12 regional offices to incorporate information about the Coupon Program into workshops and presentations held in their regions throughout 2008.
- Department of Commerce, Economic Development Administration: request information be distributed via their e-newsletter.
- Department of Housing and Urban Development: Provide educational information to participants in the various housing programs sponsored by HUD; train volunteers of the Neighborhood Networks community to help consumers complete an on-line coupon application.

In addition to the Federal agencies, members of Congress will also be provided basic information about the Coupon Program – how to get a coupon and participate in the Coupon Program – that they can share with their constituents through their regular communications.

### 3.3.3 Obtain Partner Commitment

While the organizations that will touch each target population will vary, the activities used to reach them through the selected partners will be similar. Once partners are identified, the team will seek a formal commitment for support and outline how NTIA will in turn support these organizations. Partners at all levels will be asked to send a statement-of-support letter to NTIA indicating that they are agreeing to educate consumers about the converter box coupon program. This letter will pledge that, at a minimum, the organization will:

- Send e-mail alerts to members about important dates during the digital transition and information that will aid in preparing for this switch.
- Publish an article bylined by a NTIA dignitary in organization publications.
- Link to the NTIA coupon program Web site from the organization site.
- Disseminate NTIA coupon program informational materials to chapters for on the ground penetration to constituents. *\*(This item may be removed in the event organization does not have chapters or affiliates.)*
- Authorize NTIA to include the organization in its listing of NTIA supporters.

Beyond these basic requirements, the team will work with Tier 1 and key Tier 2 supporters to develop a more customized commitment. For example, broadcast networks will be asked to tape and air PSAs with network personalities, run a scroll at the bottom of their newscasts or other key programming, or have network commentator's mention during major sporting or other special events such as the Thanksgiving or Christmas day parades. Government agencies may be asked to use a coupon program screensaver on public computers. On a case by case basis, the partners may also be asked to participate in activities such as:

- Incorporate coupon program messaging and materials into planned activities
- Serve as spokespeople in support of the Coupon Program
- Provide speaking and exhibit opportunities at conferences
- Conduct training of members
- Active participation of organization CEO or President to present our messages to their chapters, other affiliated groups

- Support program in the media
- Conduct town hall meetings
- Reprint materials
- Translate materials
- Host education and/or participation events
- Place NTIA PSA (outdoor advertising, movie theaters, etc.)
- Sponsor contest (radio informational contest, etc.)
- Support efforts presented to NTIA

### 3.3.4 Support Partner Outreach

Partner activity will follow our overall timeframe, focusing on educating constituents from September 2007 through March 2008 and supporting participation in the program from April 2008 through March 2009.

#### 3.3.4.1 Provide Basic Partner Support

By definition, a partnership is a dual responsibility. While many of the Coupon Program partners will have a stake in the efforts, they will also need support. And, more importantly, it is in NTIA's best interest to offer them support to help ensure what is being said about the Coupon Program is accurate and consistent.

For all partner tiers, the team will carry out regular communication to ensure partners know what is happening with the coupon program and to keep them motivated and engaged. Specifically, the following will be made available to all partners:

- Materials and messages. Materials and messages will be posted to a partnership section of the consumer web site so that any partner can access the materials for use in their own outreach activities.
- Quarterly e-mail updates. These updates may include information such as program updates, new tools, best practices, etc.
- Quarterly conference calls. These calls will introduce and provide detail on key partner rallying events (i.e., Experience the Benefits Week, etc.), provide program updates and allow for feedback from the field.

Special e-mail alerts. If necessary, the team will distribute e-mail alerts if an important change or issue has occurred in the program. Or the e-mail alert may be used to communicate a special request of partners or a call to action.

For Tier 1 and Tier 2 partners, the following will be offered:

- "Ready-to-send" e-mail communication for members. Key partners will be provided with a series of "ready-to-send" e-mails. Each e-mail will be designed based on the coupon program identity, but will leave room for the organization's logo. The content of each e-mail will include information about the coupon program and a link to the application. The partner will be asked to distribute the e-mail. In return, our on-line capacity will be able to report to the partner how many of their e-mails were delivered, opened, bounced-back, etc. providing the partner some benefit in that they will receive some insight into the value of their current e-mail list.

- Connect partners to each other or a stakeholder to leverage events and activities. For example, connecting a community-based organization to a retailer that may offer space for an event or a manufacturer that may be able to provide a converter box for a demo.
- Recognize their participation through timely thank you letters, a spotlight in e-mail or telephone updates or, when appropriate, allow use of their organization name on materials.

Finally, Tier 1 partners may also receive:

- A limited number of printed materials. While printing supplies will be limited, it will be beneficial to provide materials to organizations that have significant reach into our target audiences, but do not have the resources copy the materials themselves.
- Face-to-face meetings or individual calls. To build strong relationships with key partners, the team anticipates the need for a face-to-face meeting between the partner and a representative from NTIA to discuss specific activity.
- Train the trainer session. For those organizations with on-the-ground staff who can be activated in local communities across the country, a brief (no more than one hour) Web training session can be conducted to educate regional leaders on the Coupon Program and how they can engage in the outreach efforts.

#### 3.3.4.2 Specific Outreach Events

The IBM/Ketchum team is proposing that partners participate in three specific events in addition to their general outreach programs. All partners will be asked to participate in these events; however, they may use the basic concepts and rallying points, but customize it to their own abilities and resources. These ideas will be further fleshed out in specific planning documents closer to the execution date to ensure they are designed to accommodate the environment at that time.

***Education Phase Activity: Experience the Benefits Week.*** The initial months of the consumer education campaign will be used to make consumers aware of the coupon program. Initial research conducted by the NAB, coupled with consumer reaction when first shown the converter box in use, indicate focusing on the benefits of the digital television transition and the converter box to both individual consumers and their larger communities will have dual benefits. It will make consumers more open to the idea of the transition and help them recognize there are benefits they can begin to take advantage of immediately.

“Experience the Benefits,” or a similarly named week, will be a rallying point for all partners seeking to participate in Coupon Program education. The week will occur in late March or early April. Partners will be encouraged during this specified week of time to conduct activities that highlight the benefits of most interest to the populations they serve and that are most appropriate to the partner organization’s mission. For example, senior or community centers would be encouraged to provide demo’s of the converter boxes during March Madness or Major League Baseball’s opening day to highlight the clearer picture for sports fans, while the National Association of Counties may incorporate the benefits of increased communication channels for first responders during their already scheduled National County Government Week that is focused in 2008 on highlighting the ways counties work to protect and enhance the health, welfare and safety of children.

To support the effort, the partner section of [www.DTV2009.gov](http://www.DTV2009.gov) will offer suggestions for activities surrounding the benefits of the digital transition, converter box and the coupon program, materials to assist in publicizing the events being held by partners (press releases, fact sheet, etc.), and educational materials that can be distributed by the partners throughout the week.

**Participation Phase Activity: Coupon Application Completion Week.** Recognizing the awareness of the digital television transition will be significantly higher and the need for action will begin to increase in fall 2008, the team will rally all partners to participate in a Coupon Application Completion event the last week of September/first week of October. This time period is chosen because the new fall television programs are beginning, TV viewership is high, the political conventions will be complete and the dramatic increase in presidential campaign coverage will not have begun.

Similar to the spring event, all partners will be encouraged during a one-week timeframe to support their communities and constituents in helping consumers complete a coupon application. Partners will be provided with suggested activities such as a Sunday church event, local phone telethon, library sign-up day, computer access day, etc. They will also be provided with electronic materials helpful for executing and publicizing activities in their local community such as a fact sheet, electronic version of coupon application, sample press release, sample poster, and sample media pitch.

**Participation Phase Activity: Life Without Television.** The initial weeks of January mark approximately 30-days before the digital transition will occur. It is also a time of year when most media coverage is slow, but consumers are often focused on using their televisions – many are watching college football games and preparing for the Super Bowl, much of the country is indoors experiencing “winter doldrums” and many of consumers favorite programming is about to come back from the holiday hiatus. The team will rally partners to ask consumers, “What would life be like without television today?,” reminding them this could be the reality if you have yet to take action in preparation for the digital transition.

All partners will be encouraged, between January 6 and 13, 2009, to ask this question through announcements, posters, bulletins, and e-mails, and offer to support consumers with coupon application completion events. Similar to the events mentioned above, partners will be provided with sample ideas and tools to execute local community activities.

## 4. Measurement and Tracking

Program objectives that guide accomplishment of our goal include:

- Increase awareness of the converter box coupon program as one option available to consumers navigating the digital transition.
- Generate requests for coupons through calls to the toll-free number, visits to the campaign Web site, or written or faxed correspondence.
- Engage partners to disseminate information about the Coupon Program to geographic and demographic target audiences.
- Provide media information and tools needed to report on the Coupon Program.

While these are our primary objectives, there is a recognition that requests for or redemptions of coupons alone will not indicate success or failure of the consumer education program. As the government is not in a position, nor does it desire to, dictate how consumers participate in the digital television transition. Consumer education about the coupon program will offer consumers’ options, of which the coupon program is one.

The following section outlines how performance will be tracked under the contract, as well as progress against the defined objectives.

## 4.1 Tracking and Reporting Campaign Progress

Ultimately, a monthly review of coupon applications and redemptions compared to our OTA household data will indicate the success of our education efforts and highlight areas that need additional focus. However, since we do not anticipate a surge in applications and redemptions until fall 2008, and will look to other resources to help track the campaign progress along the way.

As noted throughout the plan, the team will be moving consumers from an awareness of the coupon program to participation in it. Therefore, we will collect consumer awareness tracking survey information that is publicly reported to inform progress against our awareness goals. At this time we anticipate tracking data to be reported by the Consumer Electronics Association, Association of Public Television Stations and the General Accounting Office.

Tracking data will be used to guide message deployment and emphasis. If awareness numbers are low for all populations we will need to use education messages in conjunction with participation messages into fall 2008, for example.

In addition to tracking research to measure consumer awareness and choice, we will benchmark progress against our primary strategic areas of focus – material development and distribution, partner outreach, and earned media outreach – and link that progress back to accomplishment of our objectives.

### 4.1.1 Material Distribution Tracking

While a limited number of print materials will be produced, the IBM/Ketchum team will serve as the distribution point for those items. Therefore, we will keep a comprehensive list of materials printed and their quantities. As materials are provided to partners or to NTIA for use at speaking opportunities or other outreach events, we will note how many pieces were shipped, for what purpose and the intended audience. In addition, we will gather data on hits to the consumer web site to identify which items are being viewed most frequently. Should additional printing (through a partner) be possible, this data will help guide what publications would be most beneficial to print.

### 4.1.2 Partner Letters of Support and Activity Log

The team will actively engage partners to support the campaign. To document partner participation, active partners will be asked to commit participation in the program by sending a letter of support to NTIA. Those letters (or copies of them) will be kept by us as written documentation of outside organization support of the program.

While the letters will provide commitment of support, a partner log will be the essential tool to track partner activity and outreach. The log will include a database of partners grouped into tier 1, tier 2 and tier 3. The partner log will be updated quarterly to accurately reflect progress and outreach activities. Information for the log will be culled from meetings and interaction with partners, media coverage and a call for input on quarterly partner calls. The log will include the following information:

- Organization Name
- Population reached
- Tier group
- Type of outreach/activity

- Date of activity
- Location of activity
- Estimated number of people reached

The IBM/Ketchum team will be tracking partner activity on a quarterly basis. The partner activity tracker will include a list of partners who are conducting outreach, activities they have conducted, which target population was reached (if directed to specific segment), estimated number of people reached and estimated geography reached (i.e., specific city/town, state, national). Information for input into this database will come from one-on-one discussions with partners, and requests for information in the quarterly e-mails and partner phone calls.

The fifty or more partners who commit via LOA can be held up as examples of support and creativity in an effort to encourage other partners to join the effort. The partner activity log will be frequently uploaded to the dashboard for access by NTIA and the IBM/Ketchum team. An example of the partner log is shown in Appendix D.

#### 4.1.3 Media Log

The media log is an important tool to capture media coverage of the coupon program and track our earned media efforts as well as media coverage garnered by industry and other DTV transition advocates. It will also allow us to track against our objectives to ensure we are meeting the media impressions required and inclusion of the phone number and web site in campaign coverage.

The media log will be reviewed on a monthly basis to compare media coverage with our target OTA populations and target markets. That information, coupled with coupon application and redemption data will help to guide our strategy throughout the program. For example, if coupon redemption is low in a particular market compared to the number of analog OTA households, and the media log shows saturation of the market, we may redirect efforts to build additional on-the-ground partner support.

The media log will be populated by monitoring Factiva, Google News, and cross-referencing our monitoring with NTIA clips. The log will not only capture pertinent information about the media outlet but help us to analyze where the coupon program is getting coverage; what parts of the program are being publicized and to which audiences. The log will help us to shape our messaging, and redirect our efforts when necessary. It will be updated on a weekly basis and will include the following information:

- Outlet name
- Media type
- Date
- City, State
- Confirmed coverage/headline
- Brief description
- Circulation numbers
- Reporter name
- Target audience of outlet
- Themes: Elderly, Hispanic, Asian, African American, Rural/Low Income
- Inclusion of Web site address and/or toll-free phone number

The media log will be uploaded to the program Dashboard so NTIA and all team members can access it. An example of the media log is shown in Appendix E.

#### 4.1.4 Detailed Activity Updates

In addition to reporting progress against campaign strategies, the team will keep NTIA informed of our day-to-day progress through weekly meetings and activity reports. We will prepare a meeting agenda prior to each consumer education weekly update meeting and follow-up with notes summarizing the discussion and key action items. In addition, we will submit a memo at the conclusion of each week outlining specific activity in each of our strategic program areas.

### 5. Program Execution Timeline

A detailed project plan, which will be incorporated into the NTIA Coupon Program Master Implementation Schedule, is included in Appendix A.