Strategic Communications Guidebook For Civil Society Organizations

"Step by Step Outreach, Strategies, and Tools for CSOs"

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Introduction

This guidebook is developed with the support of the USAID funded – Jordan Civil Society Program as part of the project's efforts to increase public awareness and institutional cultures regarding the importance of strategic communications in order to institutionalize its function based on international good practices.

Further, empower civil society organizations on the local and national levels, and establish sustainable professional relations with local communities, governmental ministries and entities, media outlets, and donors.

Moreover, enable civil society organizations to effectively use communications tools to establish community based networks across the different sectors, and build a positive image regarding developmental programs, and advocate for reform of relevant legislations on the decision making level, and enable civil society organizations to practice its role in monitoring and evaluating developmental programs as watch dogs for better services.

The guidebook is designed to include detailed information on terminology and principle practices in the area of strategic communications including but is not limited to media relations management, content strategies, writing newsworthy news, designing media relations campaigns and crisis management.

Practical examples and step by step templates are also provided to assist the reader to link theory with practice based on good practices.

Acknowledgement

The guidebook is developed by the communications strategist Nermeen Farouq Obeidat for the benefit of the USAID funded – Jordan Civil Society Program.

Experts and strategists in the field of civil society capacity building were involved in the development of the guidebook and they are: Ms. Rama Ishaq, Senior Team Leader for Capacity Building at the Jordan Civil Society Program, Mr. Ziad Maghroubi, Senior Communications Specialist at the Jordan Civil Society Program, and Mr. Nebojsa Radic, International Communications and Advocacy consultant.

A special thank you is extended to Mrs. Frances Abouzeid, Chief of Party of the Jordan Civil Society Program for initiating the idea of this guidebook, and supervising its development inline with a package of educational training programs on strategic communications that were developed by the program.

The first program was the Certification of Communications Trainers (CCT) which aimed at qualifying communications and media relations professionals as trainers on strategic communications to train more than 100 civil society organizations, in addition to mentor-coaching of more than 50 civil society organizations during the development and implementation of their communications initiatives.

Finally, we would like to thank representatives from civil society organizations who provided feedback on the structure and topics included in the guidebook to respond to educational needs of targeted civil society organizations in the field of strategic communications.

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CHAPTER ONE: STRATEGIC COMMUNICATIONS

- Understanding Communications for the Not-For-Profit Sector
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Understanding Communications for the Not-For-Profit Sector

What is communications for the not-for-profit sector? A simple definition might be: all communication created by and between not-for-profit actors on social, economical, and political matters- interpersonal and mediated with the purpose of achieving change across the citizen audiences.

Communications for civil society organizations can be seen in this sense as involving three sets of actors- media institutions, civil society organizations, and citizen publics.

In this view, strategic communications for the not-for- profit sector encompasses the creation, distribution, control, use, and processing of information/ data as a resource of knowledge whether for governments, organizations, groups, or individuals. Such knowledge makes decisions regarding message shaping and targeting so as to maximize desired impact while minimizing undesired collateral efforts.

Strategic communications links to the role of image management and advertising through the creation and management of media pools and activities, access to sources and events, grassroot organizing, and other devices that enable the development of a supportive environment for the work of the not-for-profit organizations, govern who is able to report what to whom, under what circumstances, and, most importantly, at whose discretion. Essentially, those devices by which public opinion can be created, shaped, sustained, manipulated, and directed toward defined objectives.

What are the models of communications for the not-for-profit sector? As civil society organization, you need to assess the model of communications to apply with the purpose of achieving change, fundraising, image building, and policy change across target audiences.

In this regard, *traditional communications* is based upon direct forms of interpersonal communications between organizations and citizens at the local level, with short-term, and ad-hoc planning by local leadership and news media acts as core intermediary between organizations and the public.

In this model of communications, local civil society organizations are locally-active, meaning that most communications and campaigning is concentrated within local communities and conducted through relatively demanding activities like local media coverage, door-to-door canvassing, community meetings, creation of local networks, and posting pamphlets.

However, *modern communications* is focused on planning activities at the central level by the organization's leaders, advised by professional specialists and or external professional consultants or supporters. In this model, content is repurposed through multichannel environment with the use of internet and social networking that allows different forms of engagement and interactivity between the organizations that are leading the communications effort and other societies.

In this framework, organizations conduct target public perception surveys, polls, and focus groups, design sound-bites, advertisements and targeted direct mail and ads, obtain interactive websites, schedule road tours, extended news management to media briefs, news conferences, and photo opportunities, handle the press, and engage via social media networks.

A strategic communications approach will allow you to develop your traditional communications strategies inline with modern communications strategies, since the two go hand-in-hand. Modern communications can generate or support traditional communications and traditional communications can create a communications buzz.

Such a holistic approach to communications is incredibly powerful and cost effective in a new communications environment.

Organizations that understand the advantages of the two models as methods of civic persuasion and marketing of social ideas tend to transform their institutional and public communications from the “me” to “we” framework.

They structure their networks through collecting people and organizations that are connected to each other in different ways through common interests or affiliations. They operate with an awareness of the networks their organization is embedded in, and listen to and cultivate these networks to achieve the impact they care about.

Ingredients for Effective Communications

Many civil society organizations have been extremely successful with their communications, and are able to achieve practical goals like influencing policy and changing behavior while others failed to do so! So what is the best formula towards achieving effective communications?

We really don’t need to rush the process. Effective communications takes time and effort, and requires successful internal communications and engagement of everyone in the organization.

Five key ingredients for well-planned communications are: objectives, audiences, messages, institutional communications systems, and tools and channels.

1. Communications Objectives

Based on earlier definition of communications for civil society organizations, the purpose of communications is to achieve or change something.

A common mistake in internal and external communications is neglecting to define communications objectives before conducting relevant efforts. Some organizations fail to see the linkages between the communications and the programmatic objectives. Communications objectives are not the same as programmatic objectives, but they do support programmatic objectives in one way or another.

Another mistake is that some organizations confuse communications objectives with communications tactics such as creating publications or organizing media activities. These are great ideas for communications activities but they are tactics or tools that would be developed or implemented to support the main communications effort (i.e. to educate, to promote understanding, generate buy-in from targeted groups and ultimately change behavior).

So, tactics are important, however, you need to think strategically, and create strategic objectives that are clear, realistic, defined, detailed, achievable, and measurable so the organization can know what it can achieve and when succeed.

2. Target Audiences

Going back to the framework of “me” to “we” for effective networked organizations, it is essential that when we think of talking to potential donors, decision makers, opinion leaders, local community or the media not to only think of what we want to say to them. Rather, we need to learn that it is important to listen to our audiences, learn more about what makes them engaged, where their values are, and what matters to them.

In other words, we need to understand that the audience is not “us”- rather we should consider the messages and approaches that work best for “them”.

So, who is the right audience? Identifying your target audience is a critical step in communications planning and is linked to your strategic communications objectives and would shape your communications strategies and tactics.

One way to answer this question is to consider who exactly has the power to deliver the change you seek whether on the strategic or grassroot levels. Therefore, your key audiences are those groups or individuals who have the power, interest, and need to help you achieve your strategic organizational objectives. Some examples of typical not-for-profit audiences include but not limited to community leaders, religious, local businesses, donors, members of the parliament, municipal governors, relevant not-for-profit organizations, potential donors, and potential volunteers.

At the very top of the "power" list will be the "decision makers" and they are the category of people who will conduct the act of change required. Usually members of the government are the decision makers especially on issues related to policy change. Beneath these are people whose opinion matters and they are called "opinion leaders". Opinion leaders are capable of directing people's opinions and influence their level of engagement in the subject matter.

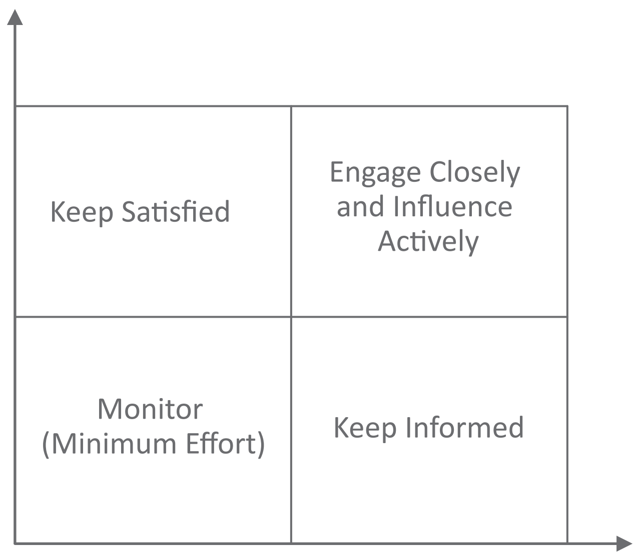
Following are stakeholders with high interest but low power and those need to be kept informed and if organized they may form the basis of an interest group or coalition which can lobby for change. Within this category, civil societies can identity free agents or connectors who can promote relevant ideas and call for action across targeted people.
Those with high power and low interest should be kept satisfied and brought as supporters for the proposed project or subject matter.

Based on these levels of engagement, you can start mapping out your audiences and find out ways and means to engage them. You need to know what action can you ask each of them to do and what type of messages you need to communicate to them so they help you achieve your objective.

If time and resources are available, further analysis can be carried out to explore in more details the nature of the power and its position and the interest that give it that position. This helps the civil society organization to better understand why people take certain stands and how they can be brought around.

The "Influence Mapping" exercise can be carried out when developing a strategic communications plan and/ or a community based campaign in order to understand the best ways and means to engage different stakeholders in the project, and how to "frame" or present the message or information so it is useful to them, and how to maintain a relationship with them in addition to identifying who should be contacting them and how to follow-up.

Figure 1: Stakeholder Analysis Grid



Another way of identifying your audiences is by categorizing audiences based on their stage or level of engagement:

- **No Engagement:** don’t even know the name or scope of work of your organization.
- **Low Engagement:** know who you are but not engaged with your organization.
- **Moderate Engagement:** may have donated or participated in an event or followed your events on social networks but currently is not involved in any activity.
- **High Engagement:** is actively engaged as a donor, free agent, volunteer, or supporter.

Remember

It is important to be specific when developing your list of target audiences (i.e. primary, secondary audiences, and the main communicators). A common mistake made by organizations is to identity the target audiences as the "general public" in a communications initiative. Why? Your communications efforts and messages will reach a wide range of people; however, you will not be able to speak to the general public but to many specific publics across the various communications layers.

3. Messages

So what is the "right message"? Developing strong and effective messages has a special meaning in strategic communications for not-for-profit sector. A message is not a marketing line or a slogan. A message is a simple and clear idea/ concept that we want our audiences to remember from our communications.

Such messages guide the development of all kinds of communications tools (i.e. institutional blurb, web pages, brochures, speeches, news releases, blogs, direct conversations with stakeholders in meetings, conferences, and community based activities and so on).

What are the qualities of effective messages? Messages should be based on facts and information, clear and simple, brief, believable, compelling, realistic, leave a positive and strong impression across target audiences and delivered by the right messenger.

So how can I start developing messages? First of all, you need to utilize untapped data that lies within your existing nonprofit organization. You need to identify the data you have, transform it into newsworthy information, and repurpose it in the format of mediated messages to improve your work, and to enhance network weaving and campaigning across the one community and others across the organization's network and promote change.

Second, you need to organize brainstorming session(s) with relevant staff to go through ideas, discuss objectives, targeted audiences and best ways to communicate the information and data you have.

Third, filter raw material and search for thematic headings. Each of these maybe the basis for a key message that will be further developed into content message that will be tested before circulating and promoting.

It is important to monitor reactions and impressions around issued messages and to always review, revise and repurpose again.

Moreover, when launching communications efforts mainly grassroot campaigns, you should consider an information diet across targeted stakeholders. So what is an “information diet”? In this diet, organizations make sure that they have an integrated content strategy on a three tiered framework: collecting information (i.e. numbers, facts, statistics, quotes) around a certain issue, curate the information inline with the organization's vision, mission, and strategic objectives and cause in place, and finally repurpose it via multichannel of communications based on an editor's agenda that includes key messages, activities, timelines, and expected outcomes.

Why do we need this information diet? Having a lot to say can be a problem for civil society organizations as the target audience will suffer from information overload and end up disengaged especially since people can only take on a limited amount of information at once. Thus, messages should be clear, concise, simple, interesting and relevant as people only take on new information when they are interested or motivated.

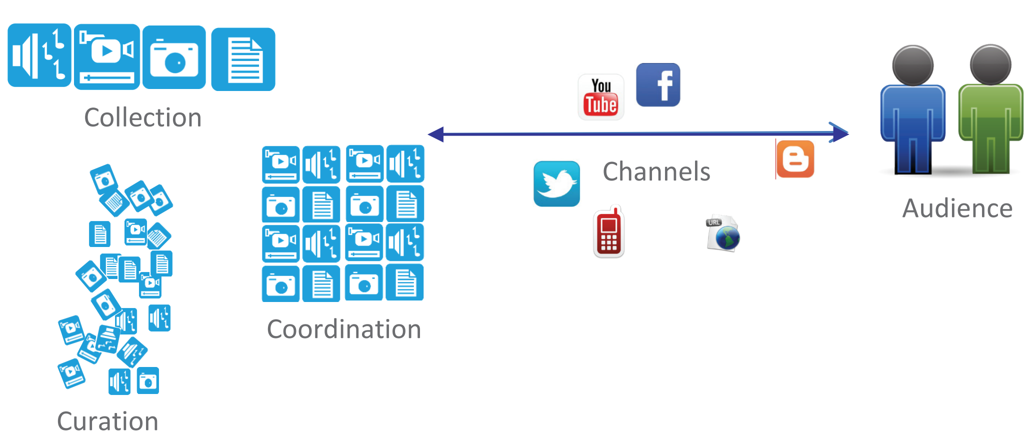
As for content strategies (electronic/print), if an organization's promotional kit or website is packed with unfocused messages on different topics, readers are unlikely to take away a clear view on the profile of the organization, causes, and action required.
The same goes for visual messages. Influential opinion leaders and policymakers are less likely to accept an invitation to sponsor or patronage an event of a civil society if the invitation kit contains many competing visual and information messages.

As for news media outlets, journalists who receive several press releases by email or fax every day are much more likely to write a story based on a press release where the message is powerful, and immediately obvious. So when developing messages, you need to think media. In other words, what media will reach your key audiences? What is the best possible headline about the project and what is the best format to get it published.

So it is very important for civil society organizations to repurpose consistent messages through the different communications channels whether it's a press release, or a one-on-one interview on TV or radio, social networking posts, publications (electronic, print) or door-to-door canvassing and town hall meetings.

Every piece of external communications should be planned and executed inline with the key messages of the organization that are included in its vision, mission, purpose and key strategic objectives. When audiences receive the same message from different sources and on different occasions, then the effect is multiplied.

Integrated Content Strategies Inline with the Editorial Calendar



Moreover, you need to brand your organization and messages by:

- Defining the organizational core values, vision and mission, and link the message with a cause or program for behavior change.
- Framing the organization's narrative to focus more on the community and less on your organization. You need to shift from being the celebrity of your commu nity to being its chief celebrant. That means the organizational brand and its narrative exist to celebrate the success of its donors, field workers or community at large, and thus, inspiring further volunteer efforts and fundraising based on shared values and a sense of community.
- Framing messaging in a way that distinguishes you from other organizations/ competitors within the cause, making it clear to donors and target audiences why they should support you and not others.

4. Institutional Systems

Another important ingredient is the institutional system, including the organizational structure of communications and the level of communications maturity within your organization and the availability of supportive leadership, communications specialists, professional grassroots organizing, and measurable performance.

More details on analyzing the maturity of communications within organizations will be presented in the second chapter of this guidebook under the Maturity Practice Model "Crawl, Walk, Run, and Fly" which has been developed based on the Social Networking Maturity Practice Model of social media trainer Beth Kanter www.bethkanter.org .

5. News Media Systems (Tools and Channels)

Finally, news media system is an ingredient for effective communications, including media production and interaction, the structure and culture of the news media, technical knowledge of the medium and its language, and strategies of "news management" that mainly are entrusted to communications specialists and media professionals.

More details on the role of media systems and media relations management will be presented in the Chapter entitled Making News.

In conclusion, it is through the marriage of data collection, curation, identification of target audiences, message branding, and effective internal organization of communications, that your organization will become an effective community architect; enabling networked partnerships and promote change.

Communications Functions

The not-for-profit sector has multiple target audiences, and your communications must be responsive to all. It is the responsibility of the senior management and the communications specialist in your organization to determine which elements of the overall communications strategy you want to communicate to each targeted segment.

In other word, you need to break down messages into pieces, and decide which piece you want to give to the right target audiences through integrated communications functions, vehicles, and tools.

So how can you integrate communications functions inline with your communications objectives, messages, and target audiences? Strategic communications require integrate, multilevel approach. Each communications function fulfils communications objectives, is targeted at specific audience that is critical to meet those objectives and is delivered through the channels most appropriate to and most effective to the target audiences.

In order to achieve the ultimate programmatic objective, all communications functions must be customized to a given objective, yet consistent with one another and with the organization's strategy.

Communications Function	Objectives	Target Audiences		Channels
		Primary	Secondary	
Media Relations	• Public relations • Crisis management	• Citizen public	• Media outlets	• Press releases, media briefings, media tours, one-on-one interviews.
Institutional Communications	• Sustainable Information flow • Internal consensus building	• Emplyees	• Local communities	• Staff meetings, memos,newsletter, website, closed Facebook page.
Financial Communications	• Transparency in managing funds and donations. • Meeting financial expectations through fundraising and leveraging	• Donors *(local,international)*	• Media, local communities, beneficiaries	• Presentations, fund raising events, conferences, meetings.

Communications Function	Objectives	Target Audiences		Channels
		Primary	Secondary	
Community Relations	• Image building • Networking • Fundraising • Meeting social expectations	• Communities	• Other NGOs, Media outlets	• Events, speeches, grassroot campaigning,
Government Communications	• Regulatory compliance	• Governors, relevant ministers	• Parliament, NGOs, media, citizen public	• Lobbying efforts, one-on-one meetings, official letters
Marketing Communications	• Image building • Fundraising	• Communities	• Other NGOs, Media outlets, public	• Advertising, promotion,
Awareness Communications	• Promote understanding • Encourage behavior change	• Communities	• Other NGOs, Media outlets	• Awareness campaigns, publications

CHAPTER TWO: COMMUNICATIONS STRATEGIC PLANNING

- Maturity Practice Model (Crawl, Walk, Run, Fly)
- From Strategy to Implementation
- The Implementation Plan
- Step by Step: How to Develop a Strategic Communications Plan Using the "Smart Chart"

Maturity Practice Model (Crawl, Walk, Run, Fly)

How can you develop creative effective communications plans? It is not about using as many tools as possible but rather the ability to improve practices in small steps. Crawl, Walk, Run, Fly (CWRF) is a maturity of practice model that can help nonprofits reach the next level, and improve how they are doing their communications to reach strategic objectives set.

In this model, there are four different levels of practice; these are classified as Crawl, Walk, Run, Fly. One level is not better than another; it is just where the organization is at with respect to its communications maturity.

It is important to note that it takes a lot of work, months, if not years to reach the highest level of practice depending on the communications organizational culture, capacity, and target audiences.

Before starting the design of your communications action plan, conduct this self assessment exercise to know where you stand, and what is required to get to the next level. If you can't fly, then you can run. If you can't run, then you can walk. If you can't walk, then you can crawl. The idea is to keep improving. Below is a table showing the four levels:

Crawl	Walk	Run	Fly
The organization and its leaders doesn't understand and value the important of communications.	Management understands the value of communication but there is no designated person to handle communications of the organization.	Communications organizational culture present with support from the board and higher management.	Effective communications on the internal and external levels.
The non-profit is not communicating consistently	The nonprofit is using one or two communications tools constantly.	Designated staff member to handle communications planning and implementation.	Continuous capacity building of the communications staff.
Lack strategic communications plan	There is a basic communications action plan that is not linked to a certain campaign, or communications objective, or civil society outcome.	There is an annual communications action plan, however, the tasks and tactics require improvement.	Strategic communications plan with SMART objectives that link to the programmatic objectives.
Doesn’t have sustainable communications tools (i.e. website, blog, Facebook page, blurb, and flyer).			Annual communications plan that includes tasks, specific target audiences, required action,message/ content themes.

Crawl	Walk	Run	Fly
Ad-hoc based media relations	There is no measurement of performance.	There are regular activities with the media namely mainstream newspapers.	Allocates sufficient resources for implementation.
Poor content (i.e. success stories, news items).	Basic interaction with media outlets.	There are measurement techniques; however, there is no analysis of data gathered for improvement.	Conduct strategic campaigns.
No reflection on results for evaluation and improvement.	There is a website and a Facebook page but are not updated constantly.		Measure performance and analyze data for improvement.

From Strategy to Implementation

When thinking of effective communications planning, nonprofits should believe in the old saying: "If you shoot without aiming, you can make dozens and even hundreds shots, without reaching your target. On the opposite, if you invest some time into aiming even one shot can be enough."

How this saying does relate to effective communications planning? When nonprofits realize the importance of the communications function within their organizations, and the need to be proactive whether they are calling for a town hall meeting or organizing a major community based campaign, planning bit by bit generates positive returns, and programmatic objectives will be translated into concrete actions that will achieve the impact desired across target audiences.

However, many of you think that the biggest challenge that nonprofits face is that too much support is geared for "ready, set" and not enough for "go". This is true in most cases and therefore, you need to consider a multiple tiered framework:

Tier#1: Create a culture of communications inside your organization

- Sustain a communications culture inside your organization on the individual and decision-making levels in order to generate leadership and support.
- Create an organizational learning environment by engaging your colleagues in identifying the communications objectives, initiatives, tools and expected outcomes and work with them to complete the communications action plan template.

- Invest in building your fundraising capacity in order to secure funds to get the good work done!
- Assign an official spokesperson for key communications initiatives when devel oping the communications action plan.
- Once you have the implementation plan down, you can identify which tasks you can delegate to other staff and volunteers and cultivated ambassadors and free agents. This way you will empower others, and increase your impact with having to do less work in the implementation phase.

Tier#2: Have a selection strategy

- Don't bite off more than you can regularly chew! Identify your communications priorities inline with your programmatic and communications objectives.
- Pick valid, realistic and relevant communications tasks to implement.
- Avoid a long list of communications efforts that end up being pushed to the backburner; creating lots of confusion and eventually you miss out lots of unique communications opportunities.
- You need to categorize your tasks on the internal and external levels. On the internal level, you need to select tasks that would sustain effective flow of information across the board and staff, maintain employee engagement, and continue the growth of an institutional learning culture. For external tasks, you need to select tasks that will contribute eventually to shifts in awareness, understanding, consideration, support and action, and other shifts in audience beliefs or behaviors.

Tier#3: Identify target audiences

- When designing your implementation plan, you should be identifying your target audiences and ways to reaching out to them (online/offline).
- Your plan should show how the selected audiences will support your SMART communications objectives, their interests, and have a clear call to action.
- You also need to identify ambassadors and free agents or connectors who will spread your messages across target communities. Those you can identify when you conduct the stakeholders power analysis explained in Chapter One.

Tier#4: Identify the right tools to use to engage with your audiences within a certain timeframe (daily, weekly, every month, every year…etc.)

- The secret to success in moving from strategy to implementation is selecting the right tool (s) for engagement at the very basic levels onwards. You need to have the right mix of tools and don't be afraid to repeat the proven. In other words, if you have specific communications tools that you used before and made sense to your target audiences then simply repeat them!
- Research new tools that can drive up engagement, and can distinguish you from other organizations.

Tier#5: Identify bullet points on content that will be used

- Many nonprofits are more used to thinking of content at a later stage during implementation or as a single task or campaign and disregard wrapping their content strategy around the implementation plan across different audiences; therefore, you need to identify the content themes that will be included in each communications task you select to include in your implementation plan.
- Look at your implementation plan as the main dashboard that will assist you later in developing key messages to communicate to target audiences.
- Mention in your implementation plan the source of the content (i.e. original content that requires research, recycled content from previously developed materials, repurposed content from other tools).
- Create content as expression of a single bigger idea or theme or smaller chunks of content that you can repurpose through different channels and tools (i.e. text in a flyer or brochure, news release, video, post or question on Facebook).

Tier#6: Build time for implementing your plan

- Don't live inside your office! It isn't effective. Therefore, build timeframes for implementing your communications tasks inline with your overall work flow. For example, some tasks might take (15-20 minutes) of your daily time for implementation (posting on Facebook, follow up with vendors, updating content on website, updating your mailing list), and some concentrated time for implementing communications activities on monthly or quarterly basis (organizing a media tour, launching a community based campaign). You also need to schedule time to collect and analyze your communications data.

Tier#7: Analyze your data for better implementation

Most civil society organizations don't have enough information to set numeric goals that are grounded in past performance. Its' ok…measuring performance is a practice that evolves over time, and can be started as follows:

- Develop a basic tracking sheet and a commitment to monthly or quarterly measurements.
- Analyze the numbers your collect and pair them with observations to improve your communications practice and move your SMART objectives forward.
- Create a feedback loop about what's working to maintain steady improve ment, and report to your colleagues on monthly basis about what your audi ences responds to.
- Set a side an hour a week to review your data gathered and reflect on it in order to recognize the communications tasks that aren't producing the desired results. This way, you will improve your planning processes and tracking ads up to a major increase in impact and innovation.

So how does an implementation plan look like?

A communication plan is simply a written statement that outlines communication goals, provides some situational analysis, and proposes approaches and activities to achieve the identified goals given the current situation.

A communications plan sets out the timeframe for carrying out these activities, details the resources and support that will be necessary to achieve your goals, and identifies how results will be measured.

The length and depth of the implementation plan depends on whether it is a three-year plan or a plan designed to support a specific communications objective (strategic/tactical) or a plan to support one communications activity.

A cautionary note to remember: while communications plans are written documents, you need to think of them as living documents. What does that mean? The reality is that communications landscape is always changing, and new opportunities will continue to arise for delivering messages across audiences (internal/external). Therefore, written communications plans should be revised regularly every 3-6 months based on ongoing evaluation and they should be constantly referenced.

One common misconception about the development of communications implementation plans is that the mode of outreach is solely focused on earned or free media. Although both are critical to key target audiences and issues, media is not the only means to reach all audiences and in some cases it is not the most effective way to use. Civil society can use paid media to enhance communications across target audiences mainly advertisements, marketing, and products.

Therefore, strategic and effective communications planning focuses on a balanced mix of different ways and means of reaching target audiences and disseminating relevant messages.

One effective way for developing a communications implementation plan is to identify key communications initiatives under the particular strategic objectives and the self assessment practice, and then design ways and means to transform the initiative into practice or action under the different communications tools (i.e. internal communications, publications (online/offline), media activities, external events, campaigns, and social networking.

In sum, creating an effective communications plan will enable you to organize communications efforts around programmatic objectives, and therefore, profile your organization in a strong, positive, and attractive way across target audiences mainly your staff, free agents, and volunteers. Further, it will frame your relations with the media, relevant civil society organizations, governmental entities, and donors in a professional and sustainable manner.

Step by Step: The "Smart Chart" Worksheet

Using SMART objectives for nonprofit communications strategies is not a new idea. Spitfire's SMART Chart planning tool has been used by the Civil Society Program CSP through its Communications Certification Training Program (CCT) program to train target nonprofits on how to strategically plan their communications.

Click here to download the Smart Chart

CHAPTER THREE: CONTENT STRATEGIES

- What is Content?
- Creating Useful and Meaningful Content
- Step by Step to Develop an Editorial Calendar
- Content Tools for Effective Public Relations (PR)

What Is Content?

A good question to start this chapter with is: "what is content"? Based on all the discussions included in this guidebook, we can say that content is any asset, object, or artifact published in a print or digital environment in order to convey information, communicate ideas, engage targeted audiences, and encourages action to support a goal or need. The table below explains the components and types of content:

WHAT	• What are the topics you want to cover? • What are the formats you are going to use (i.e. text, video, photo, diagrams, infographic).
WHY	• Why does anyone care about this content? • Does this content provide value to your cause and/or program?
HOW	• How are you going to deliver the messages across target audiences? • How should you say it (i.e. promotional, educational, awareness, call for action)?
WHERE	• Where are you going to get your content from? Are you going to listen to conversations and watch other campaigns and gather data for content development? Are you going to brainstorm with collaborators? Are you going to syndicate the content from social media?
WHEN	• When are you going to publish this content? • When are you going to update it if needed?
WHO	• Who is responsible for gathering data, and developing the content? • Who will be responsible for maintaining the content and measuring success?

Creating Useful and Meaningful Content

When you ask a nonprofit:" *What type of communications tools you would like to use in your media outreach campaign?*" often the reply would be a long list of tools that include development of flyers, brochures, factsheets, website page, and social media networks. When the same nonprofits are asked: "*what is it that you are trying to communicate through these tools? And what is your content strategy for all of these tools?*" sometimes, they come up with a list of creative ideas on how to engage with their communities; however, often they end up with a confused response.

Content strategy is one of the things that a lot of nonprofits don't think about. They think that the most important thing is to come up with a "flashy" layout design for the print publications, and to just set up a website, blog, Facebook page or Twitter account. They believe that once these tools are ready then the flow of information and ideas will be easy! While many nonprofits do actually succeed doing so, there are many others that struggle when there are no concert plans in place.

A content strategy plan is about the creation, publishing, and governance of useful and usable content. It helps you understand why your organization wants to develop content in any form, how you plan to develop and maintain the content and what are the ways to measure the success of your content. A good content strategy helps you:

1. Define what types of content and tools you need— do you need a simple flyer with information on your organization or cause, or you need factsheets and success stories with numbers and figures and testimonials? Do you need a blog to reach out for your target audiences or a Facebook page will be more effective? What types of news items you need to maintain in mainstream newspapers to guarantee effective communications on your programs? These are just some of the basic questions that you need to answer with a content strategy.

2. Enable consistency in approach and resources— do you have someone in your organization who will be responsible for the development of the content? Or you need to use a freelance writer/photographer/videographer? If you do, what are the topics that you need to cover? Will he/she be able to effectively gather data, listen to conversations around your cause via media outlets, and develop the content of strong newsworthy stories?

3. Gives the ability to link to your communications objectives and measure their impact—you need to think of what is the purpose of the content to be developed and how it links to your communications objectives and how it will help your organization or cause.

Different nonprofits would have different needs and resources for their content strategy, however, some of the elements that would be good to have in a content strategy include:

Communications Objectives	• You need to mention the strategic communications objectives, and see how the content you are going to create will achieve the overall communications objetives and messaging of the organization.
Content Objectives	• You need to explain why you want to have specific communications tools (i.e. flyer, factsheet, website, blog, Facebook page? What types of messages you want to put in these tools? What is the target number of target audiences to read your flyer, or to visit your website or to engage on your Facebook page?).
Highlights on Content Audit	• You need to conduct an inventory of your available content and understand what is the existing content available for your organization? Who created them and how are they being maintained? Which ones need updating, deleting, archiving? What are the methods for content gathering and creating and do you need to restructure the way you create your content?
Work Plan and Content Calendar	• You need to develop a list of tasks that need to get completed within a general timeframe including creation, updating, and maintenance of the content.
Success Measure	• You need to develop content matrices to measure success of content developed.

Going back to the (CWRF) framework presented in Chapter Two, below is an illustration of the maturity of practice for a nonprofit regarding the development of content strategies.

Crawl	Walk	Run	Fly
Content is developed on ad-hoc basis with no proper linkages to the strategic communications objectives, messages of the organization, and targeted audiences. Content tools are not updated and are limited to certain numbers of print publications.	The organization has a basic content strategy inline with strategic communications objectives and targeted audiences and includes print publications, a website, and a Facebook page. However, the content is not updated regularly and is not being measured.	The organization has a content strategy, and content audit plan. Publications are updated regularly and content is republished via the organization's media network, website, and social network. There is a performance metrics for measuring success.	The organization has an integrated content strategy. Able to curate content, develop it and repurpose it via online and offline communication channels across targeted audiences. Content is analyzed regularly for impact assessment.

Always remember that a good content strategy is: relevant, accurate, informative, timely, engaged, and standards- based. So once your content strategy is developed, you need to work on your content calendar which has been mentioned in pervious chapters as a useful tool for creating order out of ideas, and a commitment to publishing content.

It is a user-friendly tool for mapping relevant, compelling content to your media channels. You can develop your editorial calendar as a Word or Excel sheet or you can just develop it as a Google Spreadsheet in Arabic or English. You can tailor it to keep your team informed and aligned about communications opportunities.

In the section *Step by Step to develop editorial calendars*, you will find a sample template for an editorial calendar for civil society organizations to localize it according to their needs.

" Step by Step " : Sample of an Editor's Calendar

Organization Name															
Editorial Calendar Year (????)															
Month															
Initiative (Conferences, Media Brief, Community Meetings Art, Public, Events)	Details	Communications Tools													
		Publications													
				Timeframe	Resource	Content	Timeframe	Resource	Content	Timeframe	Resource	Content	Timeframe		

Content Tools for Effective Public Relations (PR)

1. Press Release

What is a press release?

- A summery of newsworthy facts about your program or cause on which you want media attention.

What goes into a press release?

- A press release is written in an inverted pyramid style. The first paragraph is the "lead", and it contains the most important information. Paragraphs to follow expand on that specific information and give more details in decreasing order of importance. The least important information is at the end. The first paragraph in the press release should answer:

- Who is the subject of the story?
- What is the story about?
- When is or was the event?
- Where is or was it happening?
- Why is the information important?
- Sentences should be short and easy to read, away from unexplained details and abbreviations.
- Quotes can be included in the second or third paragraph and they are always attributed.
- A headline, summarizing the news of the release that is attention getting and capitalized in English.
- Pictures can be used in high resolution, not staged or conventional.
- The press release can run one to two pages. If there is more than one page, type "more" at the end of the first page. At the end of the press release, type #### to indicate the end.
- A contact name, phone number, fax number, and email address should be mentioned in the upper side or bottom side of the press release.
- Mention release time. If the information can be used immediately, write "for immediate release". If reporters are to read the material and process the information but not release till a specific date, write "embargoed until (date of release)".

What is the format of a press release?

- Plain stationery with the organization's name and logo if available, and address with double spacing.
- Wide margins—at least 2.54 centimeters around to allow space for notes and feedback.

Remember

- *Enhance your editorial calendar with timely and newsworthy press releases.*
- *Follow up on the press release with a phone call. Ask if the reporter got your release and would like additional information.*
- *Always secure the pres release to the media before the event. If the media is invited to a press conference or briefing, make sure the press release is included in their press kits to avoid correcting misinformed media afterwards.*

2. Factsheet

What is a factsheet?

• A factsheet provides in-depth information about your program or cause with figures and facts.

What goes into a factsheet?

• A factsheet should respond to the following:

• **Significance:** the size of the problem or cause or project under implementation.
• **Relevance:** how it relates to the target audiences whether on behavior level or cost level.
• **Comparisons:** the press and public want to know how to measure things against other things they are familiar with (i.e. other projects, other problems).
• **Timely:** provides details of the program or call for action within a timeframe.
• **Specifies something new:** a factsheet should include details, numbers, facts, personal stories or analysis of data about new initiative or event or program.

What is the formula of a factsheet?

• The document should not be longer than two-three pages.
• It includes pictures that link to the achievement in place

Remember

• Avoid too many facts. You need to curate numbers and statistics from your database strategically and structure your facts to follow a logical order.

3. Success Story

What is a success story?

- A success story describes a positive change and shows how that change benefits target audiences whether individuals, families, organizations, businesses, local governments, and communities. Further, a good success story uses evidence from evaluation to show the value of the change.
- You can write a success story about your program or parts of it that is newsworthy and significant.
- The success story can be an early stage of implementing your program or when it's completed, however, in both cases you have an important accomplishment to describe. You can also track a potential success story and write about it several years after the program is completed after collecting evidence for long term impact.
- For a multi-year initiative, you can write a series of success stories that describes significant but different changes that occur over the years.

What goes into a success story?

An effective success story includes four elements:

- **Situation:** what was the problem, issue, or concern? Who cares? what prompted the change?
- **Response:** how did target audiences respond? Including staff, funders, volunteers, researchers, and what was the activities taking place such as facilitation of sessions, awareness campaign and describe partnerships formed and external funding resources attained.
- **Results:** who benefited? What was the result/outcome (qualitative/quantitative)?
- **Evidence:** describe how you evaluated the program in order to attain the proved evidence? What's the evidence?

What is the formula of a success story?

In the narrative template, include the above mentioned headings and then write your success story as a story rather than separated sections. Use short active voice paragraphs with actual names of places and people, reads like a story, avoid bullet points.
Doesn't exceed 4000 words in English. In Arabic, you can write up to 6000 words.

Remember

• During the implementation of your program, document achievements and collaborative work with stakeholders involved. Take photos and develop video segments with personal testimonials.
• You write a success story to show accountability for public funds, and verify that you are using resources to make positive change in people's lives. Further, share successes for better impact, and to reflect and learn from your work.
• You develop a success story when you have something significant to report and evaluation data to back it up.

CHAPTER FOUR: MAKING NEWS

- The Importance of Media to the Work of Civil Society
- What Makes a Story Newsworthy?
- 10 Ways to Generate Media Interest

The Importance of Media to the Work of Civil Society

Media is one of the most important allies to the nonprofit community, and establishing professional and sustainable relations with journalists is an integral part of any effective media outreach effort for the following reasons:

First; media outlets such as mainstream newspapers (print/online), television, and radio are channels used to communicate information across target audiences mainly the general public, governments, donors, and the nonprofit sector, and

Second; the media plays a major role in shaping debates, and public perceptions. Media is able to create an environment for public policy dialogue, promote awareness and information about ongoing initiatives, in addition to highlighting community based efforts and activities.

When dealing with the media, you need to remember two facts: first; Journalists have tight deadlines to meet and must manage multiple tasks in order to perform their job well, and second; they are constantly bombarded with communications materials and therefore what seems to you as important news item may not be considered newsworthy by your target media outlets. Always remember that:

- You need to understand the landscape of the target media outlets, and its relevance to your target audiences.
- Journalists should recognize you as a valuable and credible source of interesting information, facts and personal testimonies.
- You need to identify journalists who regularly write stories that are relevant to the subject matter of your media outreach effort and enhance professional relations with them.
- You need to contact them when you have urgent communications only.
- You need to always direct them to sources of information about your organization through your blog or website and always provide them with up-to-date press kits (i.e. press releases, backgrounders, factsheets, success stories, etc.).

What Makes a Story Newsworthy?

For you to be able to sustain professional relations with journalists, you need to maintain a flow of interesting and relevant stories about your organization across the media outlets. This can be achieved by establishing a good pipeline of content and engagement of target audiences across media channels.

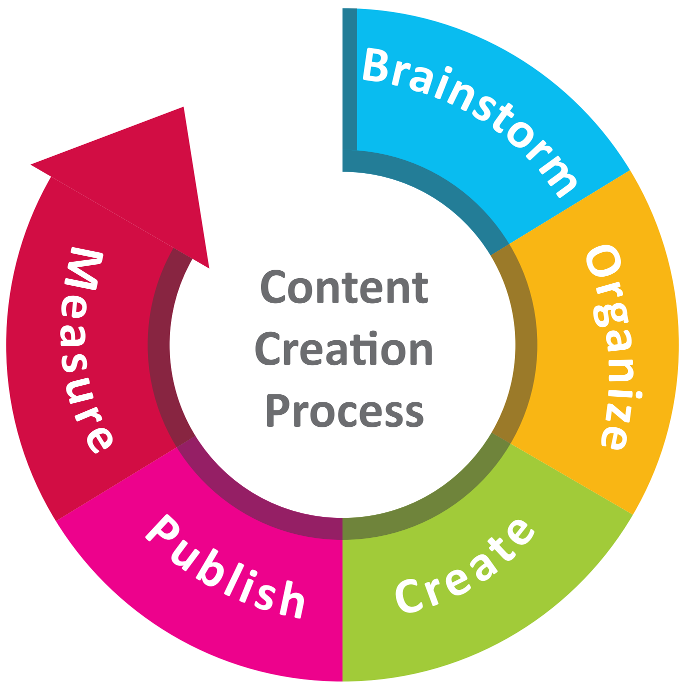
A good story starts with identifying your audience and media objectives. Your pipeline needs to include ideas for themes or topics you want to create content around. Your media content is not only a list of ideas or titles that you want to include in your editor's agenda/ calendar. Rather, it is a place to capture and flesh out the ideas that makes it easy for those working on content to collaborate with you.

You need to experiment with your media outreach content. You will learn that sometimes a news item is being promoted because of a photo you've included in your media coverage, or a reference to a source or link; achieving a higher reach, interaction and better overall engagement. Information you receive from such experimentation is useful in future development of media content strategies.

Going back to the (CWRF) framework presented in Chapter Two, below is an illustration of the maturity of practice for a nonprofit regarding the development of media newsworthy content for effective media outreach efforts.

Crawl	Walk	Run	Fly
Media content is not consistently relevant to audiences, messages and stories are general, and media activities are ad-hoc based and are not issued based on a regular schedule.	Media content is developed inline with major communications initiatives, and is aligned with target audiences and is being published based on an editorial agenda based on a regular schedule.	Media content (verbal/visual) is developed and repurposed via different media and communications channels. Media coverage is monitored and measured.	Promote very timely stories or unique campaigns and stay away from "every-day" project stories. Uses online networking mechanisms to enhance media content dissemination, and uses media and online networking analysis data to draw better conclusions when comparing results.

Based on the maturity of practice sample above, where does your organization stand with regards to media content development? And how can you enhance your organization's media coverage? Below are tips to assist you moving from your current level to the next level for effective media coverage and targeting.



2. Develop your integrated media content strategy:

- Listen to "conversations" made by target audiences about your cause and similar programs through mainstream newspapers, and online networks (i.e. social media networks, blogs, and electronic newspapers), and gather data on the main themes, messages and types of news that are attracting media attention.
- Analyze the data gathered and reflect it into a general editorial agenda with proposed media activities.
- Review available and upcoming content for programs, campaigns, and other organizational activities.
- Develop your editorial agenda and include proposed media activities, targeted audiences, message themes, ideas for newsworthy stories, and sources for in-depth information on the stories (i.e. executives in your organization, spokes person, free agents, beneficiaries from your program, donors, governmental entities involved, and relevant nonprofits from within your network).
- Think of your distribution network (online/offline) and include these tools within the editorial agenda.
- Develop measurements matrices to evaluate the media coverage, tools for dissemination, and engagement achieved.

3. Share your Ideas:

- Hold brainstorming sessions with your colleagues, and review the media activities scheduled on your editorial calendar inline with the overall communi cations action plan for feedback on selected ideas for newsworthy stories.
- Speak to target journalists about what they would consider a newsworthy story about your activities.

4. Create your Story:

- Develop content templates and use them or distribute them across staff to help you gather information, and ideas for stories. This can be time consuming as most of the time you need to create the content from scratch whether you are writing it yourself or working with other staff to create it.
- Decide on numbers, figures, photos, resource links, and testimonies that will be included in the story.

5. Engage and Assess:

- Disseminate your story through the communications channels included in your editorial agenda (online/offline).
- Monitor the media coverage for assessment of the tools that helped you to do the job, messages that drove action, and engaged target audiences.
- Use assessment data to improve and update your editorial calendar or quar terly basis.

10 Ways to Generate Media Interest

Keeping media engaged in your organization's projects and activities can improve your outcomes. Effective media coverage will draw the attention of people to your organization's efforts, educate them about your projects, and therefore, create better chances of them taking action or applying what they learn from you within their boundaries.

1. Reach out: it is always best to get an introduction even if you have relationships with journalists and media outlets. The introduction can take place online through Facebook or LinkedIn especially with regional and international media outlets. However, you can always coordinate through emails, phone, or face-to-face meetings with national and local media. Further, identify your local media outlets, and find out what kinds of stories interest them. You can engage them by inviting them to presentations, briefings at your organization, or a press trip to target projects to meet people involved in your project, and try to get them quoted in newspaper articles or on television and radio.

2. Organize community based events: invite journalists to your events. During the event, you need to assign someone to be responsible for the journalists, introduce them to people that can be interviewed, connect them with a good spokesperson who is knowledgeable about the purpose of the event, and provide them with information and photos for their media coverage.

3. Organize peer-to-peer learning sessions: organize learning sessions with target journalists and collaborators based on the topic that will be discussed. The interactive sessions will provide you with the chance to exchange views with journalists about ways and means to communicate relevant issues across the general public, approaches to develop media content, ideas for stories, channels for dissemination, and measuring impact.

4. Collaborate with media in planning and implementation: Include media outlets in the design of your media outreach campaigns, and assign roles and responsibilities to journalists, and media representatives during the implementation. This way, you will work as a team to identify newsworthy stories, and you will be able to understand work processes of the media outlets and vise versa.

5. Develop strong and up-to-date information: you need to develop your content and promote it to the target media. Examples of effective media materials include press releases, factsheets, case studies, and editorials. More details on these tools will be mentioned in Chapter Five.

6. Share the highlights of your editorial calendar: share your editorial calendar with journalists to keep them informed about your upcoming events.

7. Publicize your data: develop media coverage around your annual reports, results of research and surveys in an interesting and easy to understand, preferably using straight forward media-friendly language. Talk about the original problem, and link it to the results that show that you are making a real difference. Make it relevant to your messages and content strategies that are likely to interest media.

8. Engage on an ongoing basis: Cultivating relations with media is not a one-time event. You need to utilize communications tools to engage media in your programs and allow them to create dialogue around your causes. Therefore, you need to get to know the target media or journalists and build a long-term relationship.

9. Coordinate all internal efforts: Your colleagues need to know what you are doing with regard to reaching out for media. Each staff member needs to know when others are contacting the media and what they are saying to them. Too many contacts become irritating. Conflicting statements become confusing. Therefore, you need to work with your colleagues to build solid and consistent messages to the media.

10. Monitor the media: feedback on your communications effort is crucial, so be sure to monitor the media systematically for relevant news. Scan daily newspapers or curate clips electronically, distribute media clipping reports on staff within your organization and external strategic partners and target audience.

CHAPTER FIVE: PUBLIC RELATIONS CAMPAIGNS

- What is Public Relations (PR)
- Be Data Informed and not Data Driven in your (PR) Work
- The Intersection (Data, Audience, Message, News Value)
- Measuring and Evaluating Public Relations

What Is Public Relations (PR)

Nonprofits often ask what makes a successful public relations campaign. What would be the cost? Do we really need it?

To answer some of these questions, we need to agree that public relations work is essential for nonprofits, however, it takes a lot of work, skills, knowledge, and when practiced correctly, the results are very rewarding.

Further, Public Relations is about "relationship building" conversation with your target audiences in order to promote awareness, engagement and action. Public Relations should not, ideally, be driven by a tool. It should be driven by what you want your audiences to learn in order to achieve the change needed.

Further, media coverage enables you to tell your story, and attract more prospects for action. In addition, it makes your organization look much larger than it is, and helps you avoid price competition because the media doesn't charge for news coverage.

Remember

"Free Media Coverage" increases credibility and attracts prospects, while "Paid Media" increases name recognition.

Be Data Informed and not Data Driven in your (PR) Work

As soon as you have articulated your SMART communications objectives and performance indicators, it should guide you to what data you need to collect in order to transform it into insights, messages, and PR tools.

However, the challenge becomes figuring how to collect the data and what data really matters!

The first basic step towards gathering data is to listen to conversations develop around your cause through news media mainly mainstream newspapers, and to watch the effects of relevant campaigns that are being launched. This approach will allow you to identify more collaborators, think of your work in a network context, and put lessons learned into practice right away based on performance indicators.

The second step is to gather qualitative and quantitative data. Qualitative comes in the forms of comments, perceptions, interests, and topics that create bigger conversations across your targeted audiences. Quantitative is counting or the numbers and those can be expressed in pretty charts and graphics.

Traditionally, nonprofits are driven by funding in their communications efforts. The will roll out a communications plan, including media relations and PR action plans, and there is at least a month building it up, and then the plan is for at least three months, and maybe up to a year.

Once a campaign is running, resources have already been committed to very specific things and minimal changes can be incorporated.

With data gathering, your organization will be transformed from a data driven organization to a data- informed organization. You will be able to utilize the data gathering in your research phase to plan your PR campaign effectively, and include effective tools in your tool box.

Further, data will give you the freedom to stop doing things that don't work, stop conversations that have minimal impact, and change your plan and react to developments.

The Intersection (*data, audience, message, news value*)

When planning a media outreach campaign, it is important to line it with your overall communications implementation plan, messages, and outreach strategy. Further, you need to develop your media content strategy in terms of:

- Reach (i.e. readers of print newspapers, browsers of electronic and social networks links, visitors of your website or blog);
- Engagement (i.e. opinion writers writing about your campaign or project, publishing of the news item via electronic newspapers, rates of social networking posting, sharing, liking, and reposting of your news item);and
- Action (i.e. donations made, pressure for policy change, volunteering in your project, gaining support for implementation on the community level).

Further, you need to be aware that the best strategy to adopt when using unpaid media is the "unmarking" approach to engagement. What does that mean? It means that you need to develop your integrated content strategy and stories in a way that is authentic, meaningful, and creating helpful relationships with your target audiences through media outreach campaigns. In short, it is not about driving publicity. Engagement is the key objective that you should aim to achieve.

You need to continue promoting your newsworthy stories that are particularly timely, relevant, or important for your key audiences. And you need to promote the content that is successful when publishing via media outlets in general.

Messages should be developed to include information on the situation the campaign is addressing, the suggested approach or solutions, the target audiences involved according to their level of engagement in the issue (don't know anything about your campaign, those from whom you need to win their support, and those who are already supportive of the mandate of your organization), and the action that the public or the target audiences can take to help solve the problem.

Your media campaign would include proactive messages when introducing a subject or story idea for the first time, or it can be reactive as a respond to previous news coverage.

The campaign's messages including the problem/challenge, solution, and action required should be featured in every news item issued including press releases, articles, interviews, talking points, sound bites, and any media activity conducted during the course of the campaign. Further, relevant information to the mandate of your organization should be highlighted in the media campaign.

When designing a media outreach campaign you need to design your editorial agenda in a way to raise your organization's profile across target journalists and make them understand that your story is newsworthy.

How? Relate your story to national priorities such as public policies, current events, breaking news, key dates and occasions. Such topics are part of the daily news consumption of targeted audiences. Also, focus on "the small issues" that impact the people on the local level with tangible outputs like smart homes for efficient use of water resources, youth clubs to enhance training linked to job placements in the vocational sector, accessible voting centers for people with disabilities.

Further, avoid news competition and stay away from busy news days. Don't disturb your media contacts on days when you know they are busy with breaking news that they will cover because they will not have time for your story any way.

So what are the elements of effective public relations campaign?

1. Public Relations Plan: The first element to think of is your public relations plan. You need to define your targeted audiences and messages, content strategies, metrics for performance measurement, and ways to fit your media relations program within the overall strategic communications plan of the organization.

2. Press kits (print/electronic): you need to develop the content and layout design of a press package to use in your media relations program. It includes information on your organizations, factsheets, and series of stories all developed in a way that is easy for the news media to use. You can also publish your press kit on your blog or website so journalists can access information when needed.

3. Media lists: as mentioned in the previous chapter, it is essential to research targeted media outlets. Delivering your story in the right format to the right media is more likely to ensure successful coverage.

4. News Items: develop your editorial calendar to mark brief news items. Topics should be inline with your overall content strategy and would include announcements, press releases. Also, you can schedule a video news release for TV broadcasting.

5. Audio- visual announcements: you need to connect to target media outlets and arrange for opportunities to say something about your organization for free during a talk show or a live seminar or a one-on-one interview. You may also publish your videos through your organization's YouTube Channel. You can say a lot in 20, 30, or 60 seconds and since it is likely to be repeated several times, and shared, your message will have multiple impacts.

6. Social Media Networks: you need to develop your editorial calendar to highlight the news items that will be republished through social media networks, in addition to topics that will only be highlighted via your social media network for effective engagement with your target audiences. Also, you can publish articles on your organization's blog and share with other nonprofits and media outlets. These articles are an excellent opportunity to comment on issues of the day and to build name recognition as n expert in the field.

7. Identified Spokespersons: your editorial calendar should include details on spokespersons of specific activities as media usually wants to speak to an authority in the field for in-depth stories. The spokesperson can be someone from your organization, or an independent person or third party supporter that supports your organization, or one of the target beneficiaries.

8. Identified Third Party Supporters: you should include free agents in your PR planning. A free agent is a person who is passionate about a social cause but is working outside of a nonprofit organization to organize, mobilize, raise awareness and funds and engage with others. Also, a free agent can also be fluent in media networking and take advantage of communications toolset to do everything but outside of institutional walls.

9. Media Tours: opening the doors to the media to provide media coverage on your projects and engage with beneficiaries has positive effectives. But what about Press Conferences? There are two reasons why nonprofits should avoid press conferences. One is that there is no time of the day that is convenient for all of the news media to show up to your event given the differing deadlines pressures. And if a major event conflicts with your press conference, then you've lost your audiences altogether. The second reason is that journalists prefer to get exclusive stories away from competition.

10. Special Events: your PR should include special events that can be held to launch a new project or campaign, or spotlight something very visual that cannot be communicated via a press release like launching your website or a documentary. However, it is just as important to provide media with a press kit that includes background material, a one pager, and any information that will help them write a good story.

11. Open days: open days can be good opportunities to make announcements, and alliances and journalists are often present. You can publicize for these events through your social media networks, post photos or videos during the events, post quotes of participants and provide up-to-date information throughout the event and beyond.

12. Community Meetings: it is important to stay in touch with your target communities to explain various portions of a program that will directly or indirectly impact them. In addition, you can use community meetings to reach out to your target audiences in the case of any negative publicity caused by lack of accurate information.

13. Press Clippings: it is important to maintain a print and or electronic archive of relevant media coverage for analysis and performance measurement to judge whether your news is reaching your target audience and if your PR is effective.

14. Specialized publications: this includes packaging detailed information with numbers and diagrams in a factsheet or a newsletter (electronic/print). Information included can be used by media for the development of a press release and material for future in-depth articles. Annual reports and surveys are also effective tools to publish your strategic messages.

15. Crisis Management: your PR campaign should consider crisis management to avoid negative publicity and/or disengagement from target audiences. You need to prepare facts, figures, and quotes from executives in your organization and have a spokesperson ready, trained and well briefed to deal with the media. Also, be prepared with a response to media inquires. Further details on crisis management will be explained in chapter seven.

Measuring and Evaluating Public Relations

As mentioned earlier, for nonprofits to be data informed and not data driven, nonprofits need to measure and evaluate their public relations efforts. This can be done by:

- **First:** surveying the target audience (before/after the public relations campaign).
- **Second:** assessing media coverage (amount and value of news media coverage generated);
- **Third:** recording and reporting everything (record reactions to your media coverage by target audiences and journalists).
- **Fourth:** including a measurable call to action in your PR story, as it provides good indication of how the story is being received.

CHAPTER SIX: SOCIAL NETWORKING

- From Non-Networked to Networked Organizations
- Social Media Tools

From Non-Networked to Networked Organizations

When talking about the use of social media for nonprofits in Jordan, we need to take into account the status quo of the Internet throughout the country. Some points to mention in this regard:

1. Internet infrastructure and accessibility varies from one governorate to the other, which means that for some nonprofits the internet is accessible within their organizations (24/7) while for other nonprofits, it means a two hours commuting through public transportation to use the internet offered free of charge at governmental knowledge centers that have specific opening hours and are closed during the weekends.

2. Cost of internet access and telecom is considered relatively high for most of the nonprofits in Jordan.

3. Internet and social media use varies greatly from one governorate to the other. However, it is noted that Facebook is very popular throughout the country.

4. Social media is seen as a useful bridge to target decision makers, donors, media, governmental ministries and other nonprofits on the national and regional levels.

5. Arabic content makes up less than about 1% of all web content, meaning that web use often implies having to work in a second language and culture.

Given such challenges and differences, social media may be considered as an important tool for some nonprofits, and a luxury tool for others.

In all cases, when using social media for communications, identifying clear objectives and target audiences becomes critical. Further, effective social media strategy isn't about using as many tools as possible. What it does take to succeed is the ability to improve practice in small steps till you reach your strategic communications goals.

Going back to the CWRF maturity of practice model, below is an illustration of the maturity of practice for a nonprofit regarding the use of social media strategically.

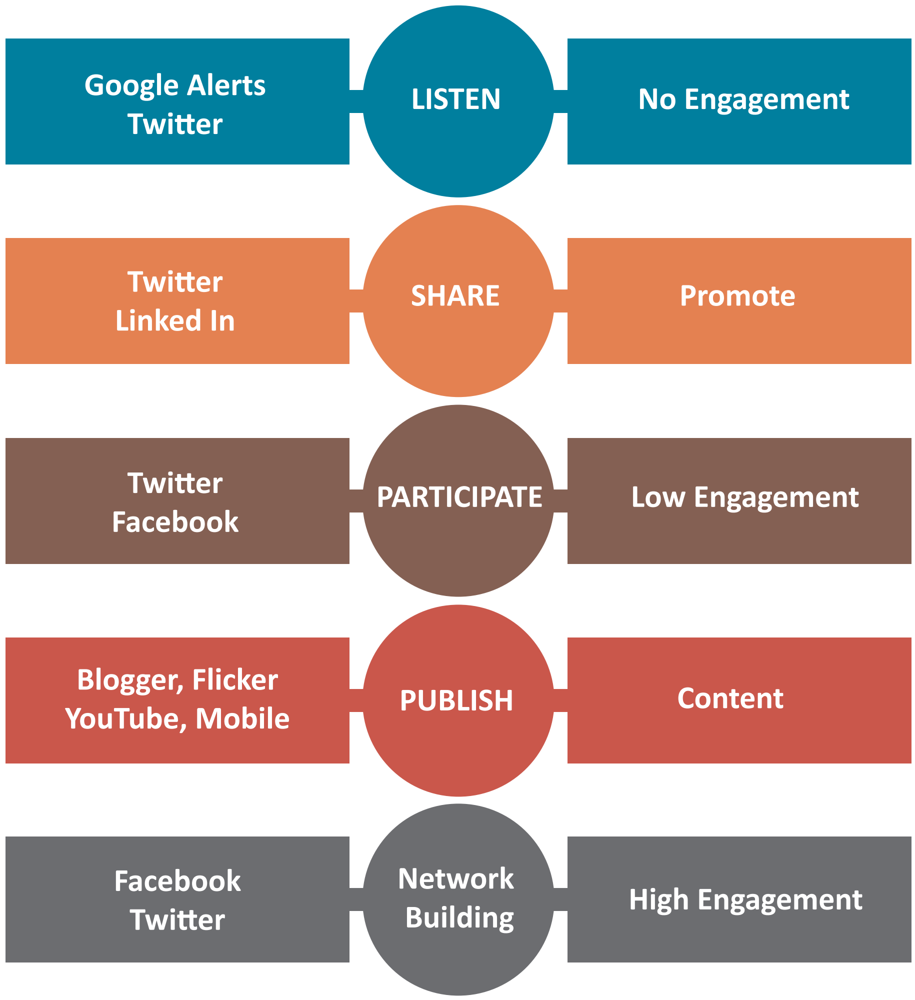
Crawl	Walk	Run	Fly
There is no methodical, well-thought communi-cations plan that links to the organization's social media strategy. The organization tries to be on too many different social media sites without the capacity or strategy to support effective implementtion.	The organization focuses on the use of specific social media networks; however, staff doesn't have the time or skills to implement a social media plan on an ongoing basis.	There is a culture that understands the value of using social media within the organization and they want to do things in a different way from others. Online activities are reflected in an editorial calendar and content are developed accordingly.however; there is no measurement of social networking presence.	There is a social media plan inline with a strategic communica-tions plan. There is a protocol that governs engagement and conversations online. Offline activities are reflected into online actions based on measurement metrics.

As explained in Chapter One, effective communications enables a nonprofit to transform from a non-networked organization to a networked organization. Therefore, creating a social network depends solely on the level of understanding of nonprofits of how to use social networks to reach their goals by using social media.

Social networks are collections of people ad organizations that are connected to each other in different ways through common action, interests or affiliations. Social networks have different patterns and structures to them and the glue that keeps networks together is relationships. Such relations when built correctly will guarantee impactful results.

Social media is an inexpensive and easy way to engage target audiences, raise funds, and launch campaigns. However, it is important to have a strategy that steers the choice of tools. Nonprofits use social media to: first; connect with relevant nonprofits on the national, regional and internal levels, second; increase visibility of its programs and successes, third; promote online action that is inline with offline activities, and finally, to create professional networks.

One common theme is that tools come and go; however, the strategy is really important. The framework that you need to remember when designing your social media strategy is:



Integrated social media into communications and media outreach campaigns and activities allows nonprofits to leverage social dynamics and networks to encourage participation, conversations, and community in order to spread key messages and influence sector based decision making.

Social media also helps reach targeted audiences when, where, and how they want to receive relevant messages. Likewise, taping into personal networks and presenting information in multiple formats, spaces, and sources, helps to make messages more credible and effective.

Remember

It is important to support your social media strategy with relevant policies with recommendations around the use of social media at your organization.

Social Media Tools

This Chapter will focus on the technical skills and best practices for deploying three social media channels. These tools have been selected because they are useful, in general for nonprofits: Blogging, LinkedIn, and Facebook.

In this regard, it is essential to recognize that many nonprofits may not have need capacity to devote full-time to supporting their social media channels. Therefore, there is a need to take a selective approach, focusing on adopting different tools or one tool at a time and only tools that make sense to reach your target audiences.

LinkedIn for example, is an effective tool for nonprofits that are seeking marketing professional services of their organization, while blogging is more for promoting awareness, and driving actio n. Facebook will work for both.

1. Blogging for Nonprofits

Why a blog can be useful for nonprofits?

- Engage with targeted audiences, making announcements.
- Social media integration into strategic communications plans.

What will you blog about? Editorial Focus

Content	Steps
What are you going to write about?	Brainstorm with your colleagues a list of topics and ideas
Will it support your social media strategy and overall strategic communications objectives	Brainstorm your social networking content strategy and linkages to the overall communications action plan
What will be useful for your audiences	Research your targeted audiences social behaviors, messages themes
How often will you publish blog posts	Brainstorm topics for blogs and include them in your editorial calendar. Identify one staff member or a freelance writer to do the job

Types of Blog Posts	Workflow of Blogs	Blog Post Structure
About your organization Ongoing programs and projects Success stories Media coverage Features Interviews Announcements Case studies Results of researches and public surveys	Reading Writing commenting	Post title Body of the post Conclusion Related posts

Blogging Style Guidelines

250-750 words in English and up to 1200 words in Arabic.
Use your own photos to give interest.
Descriptive title.
First paragraph to state what you are writing about.
Use headlines in the body of the post.

Blogging Platforms: Introducing Blogger

Blogger is a blog-publishing service owned by Google that is easy to navigate, available in countless languages and simple to design.

Step by Step To Set Your Blogger Account

Create a Gmail account for access to all Blogger features
Visit Blogger.com/start
Click on the orange arrow that says "Create Your Blog Now"
Create your blog name
Choose a template
Click on the "Start Blogging" arrow
Write your first blog post and then click "Publish Post"
Click "View Blog" to see your post
Click on the orange B at any time to go to your dashboard

2. Facebook

Why and How Facebook is Useful for Nonprofits?

- Keep targeted audiences engaged with your programs (current/potential).
- Raise awareness on programs, events, concerns, and call for action.
- Inspire conversations online/offline to support audience development.
- Research what targeted audiences are saying about your organization.
- Drive traffic to other social media networks, blog, and website.
- Social content generation.
- Establish and enhance your professional network (i.e. free agents, volunteers).

How to Set Up Facebook Page

- Refer to steps here: http/www.facebook.com/nonprofits

Understanding the work Flow and Time Commitment for a Successful Facebook Page

You need to assign a page administrator who will be responsible for updating the page with fresh content, maintain conversations, and allocate time for planning, collecting and analyzing data. As an administrator, the main tasks include being a resource, engaging, moderating, and measuring. Also, it is important to have a Facebook Use Policy that outlines what types of posts are appropriate. This will be helpful to set the rules of conduct across your colleagues and or volunteers helping your organization.

Engaging your Audience and Creating Effective Content

Include types of content in your editorial calendar.
Use 80 characters or less for status updates in English and up to 140 in Arabic.
Include eye catching images
Include a call to action: share, like, comment
Celebrate success stories and share good news in a timely manner
Experiment with varying times of the day
Weekly/ monthly review of analytics to better understand the dynamics of your page.
Use Facebook Insights to analyze data on your Facebook Page.

3. LinkedIn for Professional Networking

Why LinkedIn is Useful for Nonprofits?

LinkedIn is a professional social network. It is the best social channel for business to business networking. LinkedIn allows you to meet potential collaborators, partners, and leverage relationships.

Tips to Consider When Using LinkedIn?

Use professional headline that brand your organization.
Customize your profile URL with your organization's name, and area of expertise.
Include your blog or website links.
Complete your organization's profile
Use keywords
Use your organization's logo
Include affiliations
Post updates
Tell your organization's story
Describe your programs, causes, and achievements
Use "Advanced Search" options for business development and growing your network
Send updates to your followers

The Work Flow

Manage your inbox for incoming messages and invitations at least once a week.
Read LinkedIn.Com/Today. Share links of interesting articles and industry news.
Follow target stakeholders and nonprofits on the national, regional, and international levels.
Look through your connections.

CHAPTER SEVEN: CRISIS COMMUNICATIONS MANAGEMENT

- Effective Crisis Communications Management for Nonprofits
- Step by Step to Develop a Crisis Management Plan

Effective Crisis Communications Management for Nonprofits

It is the fear of every nonprofit that a real problem can happen even when the most effective communications and media outreach efforts are well planned.

Nonprofits that work on social change are not immune to misunderstandings, reputation damage, and public relations disasters. Changing conditions, current events, and negative attitudes from competitors or even people with bad perception about your organization or programs can throw the best communications planning off track.

In this context, it is important to have a crisis management plan with a coordinated crisis management team, to manage events or situations that are unexpected and possibly have negative impact on your organization.

Such a plan will provide a unified structure, management, and communications resources prior to a crisis in order to provide accurate and quick response, establish accountability and minimize negative impact.

Step # 1: Crisis Self Audit

When planning for your crisis communications, you need to conduct a crisis self-audit. The Self-audit will help you assess your organization, recognize potential risks, and assist you in the development of the crisis communications plan. Questions to include in this sheet would include:

- Do you have defined events or situations that you would consider a crisis to your organization or program (Yes/No)?

- Is there a designated person or team authorized to implement a crisis communi cations plan, and come up with quick and right responses (Yes/No)?

- Do you have trained team to respond to such crisis (Yes/No)?

- Is there a crisis communications plan in place to provide the structure for a planned response (Yes/No)?

- Are identified collaborators, beneficiaries and the media included in the plan (Yes/No)?

- Do you have clear roles and responsibilities of your team in the crisis plan (Yes/No)?

- Are the key messages developed from the priority issue and included in your content strategy?

- Do you have ready templates for news releases, and other media tools that will be included in the information kit?

Step #2: Crisis Preparation

- Identify a qualified team of professionals from your organization or collaborators network, and assign a primary spokesperson that will handle media issues at the time of a crisis.

- Provide the team with relevant media training for a quick and accountable response to media for limited negative impact.

- Develop a crisis contact sheet including your team, collaborators, and the media resources you trust. This sheet needs to have the name, title, work phone, cell phone, home phone, email (work/personal) and assigned responsi bility at the time of a crisis so that contacts can be reached any time.

- Establish a network of collaborators and free agents (organization's ambassadors), and utilize this relationship building and engagement tactics quickly at the time of a crisis.

- Include crisis management in your communications policy. This includes creating a flow chart or dealing with crisis situation. The key points include: notice the crisis situation, evaluate the situation, and respond to the situation.

- Be ready with a crisis management information kit. This information contains information that would be relevant in the event of the crisis for media coverage purposes.

- Monitor and track media coverage and social media networks mainly through Google Alerts and/ or any media monitoring systems you have to catch early warning signs (i.e. people making negative comments about your programs, news items that provide inaccurate coverage that might cause misunderstanding, and/ or wrong public perception about your organization or projects).

Step # 3: Communications During the Crisis

- In the case a crisis takes place, you need to assemble your team, analyze the situation, develop messages, and react to the crisis within (24-48) hours. Questions the crisis team must ask itself: what happened? How do we know? Who is responsible? Why did it happen? Who is affected? What should we do? Who we can trust? Who needs to hear from us? What should we say? How should we say it?

- Formulate key messages that are clear and include them in your content strategy. They have to be accurate, clear, creative and responsive to the issue. Remember the "Four Rs" of crisis communications when developing your key messages: Regret. Responsibility, Reform, Restitution. Matrix below includes further details on each:

• The first thing you should do is express concern that a problem has developed – even if it was not your fault.	Regret
• Whether the cause of the problem was the organization's fault or not, the organization should be prepared to take responsibility for solving the problem. Your actions will reinforce its words and provide a credible demonstration of your commitment to doing the right thing.	Responsibility
• Your various stakeholder audiences must know that your organization is taking steps to ensure the problem will not happen again.	Reform
• If appropriate, detail how your organization will help those who have been affected by the problem if any.	Restitution

- Create an information kit including a factsheet and a press release with basic information along with quotes to be distributed across target media outlets. Additional resources to create could include a "behind-the-scenes" blog to house information on the crisis. In addition, you can upload pictures and videos on your Facebook page that can visually support your public statements.

- Communicate your messages across targeted audiences honestly, openly, and in a timely manner is central. You need to consider which key audiences or stake holders need to be targeted. Further, include in your content strategy the target audience, potential communications vehicles/tools (i.e. personal meetings, phone calls, emails or newsletter, information package, external Qs&As, press conference or briefing, social media networking, etc.).

- When talking to the media, you need to write down the reporter's name, their media outlet and their phone number. This helps you to contact them if you need to update them on the situation. Further, stick to what you know and refer media to other technical people or the spokesperson for further information.

- As new information emerges, you need to evaluate your messages and targeted audiences and change your messages and outreach approach to reflect the most up-to-date information. Below is an "Action Matrix", outlining the possi ble actions and measure each area using specific criteria (H-High, M-medium, or L-low).

Action Matrix				
Crisis	**Timing**	**Trend**	**Impact**	**Process**
XXXXX	• How urgent is the crisis? What will happen if nothing is done?	• Is there a potential that the crisis will grow if no action is taken?	• How serious is the problem? What are the effects across target audiences?	• What are the PAST reasons? How can we correct the PRESENT situations? How to prevent FUTURE ones?

Step # 4: Assessment and Reflection

- Once the crisis is resolved, you need to address the reason for the crisis and include any changes required on your communications plan.

- The important thing to know is that you need to admit that mistakes happen, apologies for them and move on. It is essential to allow yourself to admit the mistake and to learn from it in order to improve what you are doing.

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THE SCIENCE OF IMPROVING LIVES

THE SPITFIRE STRATEGIES
SMART CHART 3.0

An Even More Effective Tool to Help Nonprofits Make Smart Communications Choices

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Spitfire Strategies

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THE SMART CHART FOR COMMUNICATIONS

A Tool to Help Nonprofits Make Smart Communications Choices

Whether you are just starting the communications planning process, checking in on a communications campaign already in progress, or interested in reviewing an effort you have already executed, the Smart Chart 3.0™ will help you assess your strategic decisions to ensure that your communications strategy delivers high impact.

Strategic communications decisions are the building blocks of any successful communications planning and implementation effort. When used correctly, this tool will create stronger outcomes and help you use resources more effectively.

Fight the urge to think tactically in the beginning. Strategic decisions must be made before you settle on tactics. To create a high impact communications effort, strategy must drive tactics—not the other way around.

What's New?

For those already familiar with previous versions of the tool, here's a snapshot of what's different. At the center of this document, you will find Smart Chart 3.0 – an even more effective strategic communications tool that builds upon the original Smart Chart. You can remove the chart – or leave it attached. As you work your way through the planning exercises, stop and fill in sections of the chart. If you follow all the steps – in order – you will finish with a solid communications strategy.

Our best advice:
Think inside the box

For big fans of the old Smart Chart, don't panic. We made only slight modifications, primarily to reflect feedback from more than 500 trainings and workshops with nonprofit organizations and foundations for how to make this tool even more user-friendly and effective.

Other updates reflect the findings from our research on the Activation Point™. In December 2006, the Communications Leadership Institute partnered with Spitfire Strategies to research the best practices of persuasion. Through focus groups, case study research, an extensive literature review, brainstorms with an expert panel, and a proprietary research tool called PowerGames, we developed recommendations for the best strategies and approaches public interest groups can use to create change by getting the right people to take the right action at the right time. To access the full report, visit www.activationpoint.org.

Based on the Activation Point, we've updated the Smart Chart with a new section on audience readiness that will help you gauge the stage of persuasion you need to work through with your audience(s). We've simplified some sections of the tool to streamline your planning process and reformatted the Smart Chart to account for communications efforts designed to engage multiple audiences. We've also added a section to help you plot your communications activities on a timeline and assign key tasks to the key players on your communications team. Finally, we've added a section on implementation and evaluation to help you test the rationale for your strategy, and set benchmarks to measure your progress as you put the strategy into action.

Smart Chart 3.0 can make your communications reach and impact even more effective. But despite the changes, we still want you to "think inside the box" and make the decisions in order.

To download and print additional copies of the Smart Chart 3.0 (or the original Smart Chart) log on to www.smartchart.org. The site also includes an interactive planning tool to further enhance your planning activities.

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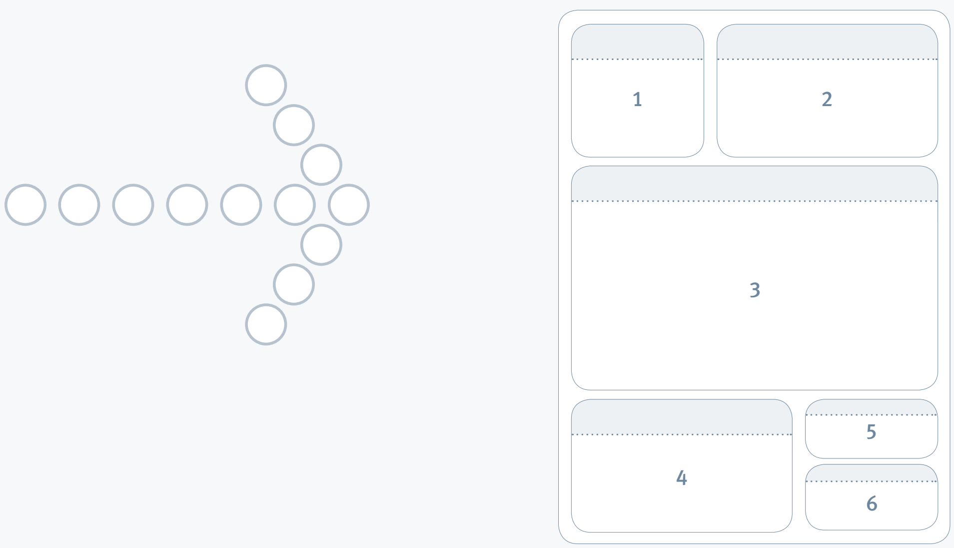
Getting Started

This process is not rocket science, but it does require time, commitment and focus. Building consensus among campaign partners around the decisions you need to make is not always easy – but it is necessary. Abdicating decisions will lead to less effective communications.

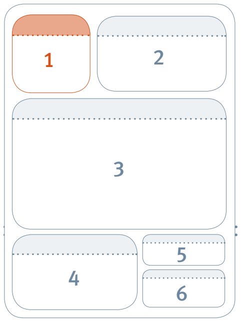
The Smart Chart features six major strategic decision sections:
1. Program Decisions (Broad Goal, Objective, Decision Maker)
2. Context (Internal and External Scans and Position)
3. Strategic Choices (Audience, Readiness, Core Concerns, Theme, Message and Messenger)
4. Communications Activities (Tactics, Timeline, Assignments and Budget)
5. Measurements of Success
6. Final Reality Check

When making your strategic decisions, start with Program Decisions and go in order. Establish your objective before you select a decision maker. If you don't have a clear objective, how will you know who ultimately will make the decision that helps you achieve it? Similarly, audience must come before message. How will you know what to say if you don't know who you are talking to? You get the idea.

Have a solid rationale for each of your decisions. If you are relying on a big assumption to make the decision, examine it to ensure your strategy won't fall apart because of an untested guess. Only with a strong foundation for your decisions can you move on to how to get your messages to the right audience(s) through effective implementation.



STEP ONE:
PROGRAM DECISIONS



The first step: Identify your broad goal, objective and decision maker. Communications planning CANNOT happen before these decisions are made and you establish the three guiding points for your efforts.

The Guiding Points –
BROAD GOAL, OBJECTIVE, DECISION MAKER

Lewis Carroll said, “If you don’t know where you are going, every road leads you there.” The good news is you know where you are going. These key points will guide your strategic communications decisions and strategies. They are fixed points. Never lose sight of them. They are the key to having a high-impact communications program.

1 What are you trying to do?
BROAD GOAL

All good communications efforts are rooted in a vision for change. What is the big, hairy, ambitious goal you have for changing the world? What’s the vision that your organization’s mission is rooted in? These core aspects of your work are vital grounding for your communications efforts, as they will inform your strategic choices and set the tone of your efforts.

It’s likely that your vision is not something you can achieve in a short period of time, but instead is a long-term goal that might take 10, 20, 30 years or more to achieve. It’s impossible to create a long-term communications plan, because the environment can change dramatically in just a few years, or even less. Consequently, most concrete communications strategies are fairly short term, about 12-18 months – and that’s the recommended time horizon for your Smart Chart, too. So how do you reconcile a 20-year vision with a 12-month work plan? The solution is to break your vision into smaller pieces that will help you incrementally achieve your grander goals. Then plan your communications efforts to support those incremental points of progress.

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2 What concrete step will you take to achieve your vision?

YOUR OBJECTIVE

Communications strategies support an organizational vision, but there is a difference between vision and objective. Your objective is the next step in your overall plan for achieving your vision.

Flowing from your vision, you can establish a concrete, measurable objective. A well-defined objective is THE MOST important component of a good strategy. If the objective is too broad, the decisions made from this point on will be vague, virtually guaranteeing an ineffective effort. This objective must be measurable and should represent a definitive plan of action. Your objective should be **SMART:**

Specific
Measurable
Attainable
Realistic
Time-bound

Generally, objectives can be divided into two categories: behavior change and policy change (which can mean government or corporate policy). These are two dramatically different objective types. Your organization may choose to pursue both types as part of your effort. It's highly unlikely that you'll be able to identify a single silver bullet objective that will allow you to achieve your vision or mission in one fell swoop.

More often than not, in working to achieve their vision, organizations need to pursue multiple objectives. If this is the case, you should develop a separate Smart Chart for each objective since it is very likely that the decision makers, audiences, and messages for each objective will be quite different. It is fine to have different strategies as long as they do not contradict each other. For example, Shape Up Somerville wanted to take a comprehensive approach to improving health in their Massachusetts community. So they set multiple objectives including changing school lunch menus at all 10 elementary schools to meet specific nutritional standards; implementing Health Eating and Active Time curriculum in key elementary schools and after-school programs; persuading 20 restaurants in town to take specific steps – such as offering smaller portions and low-fat options – to become Shape Up approved; and encouraging walking by establishing Safe Routes to school for all first- through third-grade students living within a half-mile of their elementary school. Though Shape Up Somerville pursued parallel objectives, each one required a distinct communications strategy (and therefore a distinct Smart Chart).

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No “silver-bullet” goal setting.

Watch out for vague objectives like “raising public awareness.” Usually public awareness is not an objective in and of itself. It is a midpoint on the road to changing behavior or a means of putting pressure on political or corporate leadership. You could do a poll before and after your campaign and find out that many people are aware of your issue, but didn’t change their behavior or take action.

Ask yourself, why do you want to raise awareness? Do you want to pass a bill, change consumer behavior, or decrease the cost of immunization shots? State a specific objective, and then decide how you are going to measure your progress toward this objective. “Stopping global climate change” or “saving the children” are certainly worthy aspirations, but they are big visions, not concrete objectives. “Increasing the number of households who recycle” or “providing health care coverage to all children in our state” are achievable objectives.

Mission	Objective
Save the children	Pass legislation this year to ensure every child in the state has access to quality health care
Save the environment	Increase the number of households recycling in our community by 5 percent this year
End foodborne illnesses	Establish a single federal agency that oversees food safety by the end of next year
End cervical cancer	Within six months, get the top 200 best companies for women (as rated by women’s magazines) to distribute educational materials to their employees about screening
Abolish the death penalty	By 2010, provide DNA testing to every person in the country accused of murder

Where They Started — **Doable and Measurable Program Objectives** — **Broad Goal**

High rates of child obesity, sedentary lifestyle. → Change school lunch menus at all 10 elementary schools to meet specific nutritional standards; → Implement Health Eating and Active Time curriculum in key elementary schools and after-school programs; → Persuade 20 restaurants in town to take specific steps to become Shape Up approved; → Encourage walking by establishing Safe Routes to school for all first- through third-grade students living within a half-mile of their elementary school. → Keep children’s weight at healthy levels, for a healthy community.

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3 Who makes your objective a reality?

DECISION MAKER

Make Program Decisions

Broad Goal

↓

Objective

↓

Decision Maker

It is critical to identify the decision maker you are ultimately trying to reach. It will guide you in making choices about who your target audiences are. The ultimate decision maker is the person who has the power to give you what you want – the person who can say yes or no to your objective. If your objective is to change behavior, the decision maker may be a specific consumer group. For example, coffee drinkers may be the decision maker in an effort to promote fair-trade-labeled coffee. If your objective is to impact a corporate policy, the decision maker may be the head buyer or CEO of a company that can choose to offer the fair-trade label in its stores. If the objective is city, state or federal policy, the decision maker may be an elected official or an appointed staffer. Whoever ultimately votes for or can change a policy is your decision maker.

Later in the audience targeting section, you will decide if you are going to approach the decision makers directly or reach them through other people they listen to most. Your organization may not have immediate or direct access to the decision maker(s). But once you have identified who you ultimately need to influence or activate, you can figure out how best to get to them.

STOP: Go to the chart and complete Step One by filling in your broad goal, objective, and decision maker in the boxes provided.

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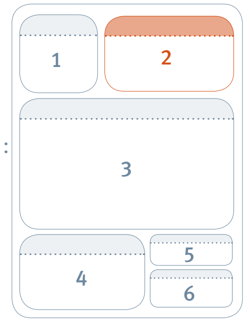


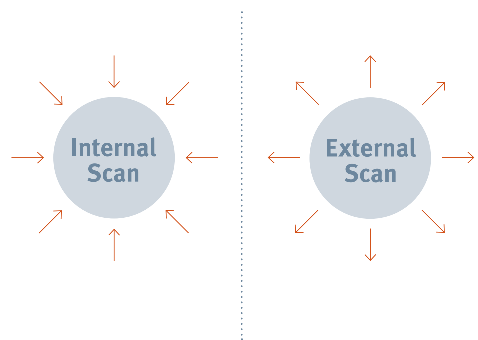
Internal Scan

The internal scan assesses an organization's assets and challenges from a capacity perspective. What staff, resources and tools do you have to use when planning your communications? Are you a media machine, or do you have a lot of academics who don't like to "dumb things down" when they talk to the press? Do you have access to in-house research or other knowledge that can help inform your strategy? Think about your reputation: are you well known or are you little known? Are you a part of any coalitions or partnerships that can or should come into play for this effort?

External Scan

The external scan is your best opportunity to assess the environment for your communications efforts. Take stock of what's happening around you that will affect your communications strategy. What's the present state of debate on your issue? Are there timing considerations for your issue, or key events you must factor into your strategy? Will timing be a constraint? What other organizations are working on this issue, and are they working with you or against you? What barriers might you face in getting people to take action on the issue? Are there misconceptions or misinformation on your issue that might get in the way of your communications efforts? What obstacles or opportunities might you encounter along the way? Are there natural communications opportunities you can leverage to help advance your strategy? What unexpected events could help or harm your efforts if they occur?

2. Set Context for Efforts



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Define Your Position:
Where is your organization in the debate?

Too many groups start a communications effort as if no one has ever discussed their issue before. The truth is, there are usually known facts, perceptions, players, opposition, and a debate already in play.

The key is to understand how an issue is currently perceived. First, ask stakeholders or other people with deeper knowledge than the average person. What do they think about the issue? Then, check that against those outside your issue area to gain perspective. Conduct a media audit to gauge how the media is covering the issue. Consider all this information, then assess your position relative to the current discussion of the issue.

You need to understand the existing debate – if there is one – before you can determine whether to focus your efforts on **framing, forifying and amplifying** or **reframing** the existing debate:

Position 1: Frame. Most organizations think they are here, but it's rare that they actually are. Framing a debate means there is no current discussion about the issue. You can't poll on the issue because no one would know what you were talking about. In fact, the idea is so new you might have to use a metaphor to explain it. There aren't a lot of misperceptions because there isn't yet a lot of knowledge. Issues for which there is no existing debate are rare, but it is then and only then that you have the opportunity to set the initial frame.

Bob Putnam's book "Bowling Alone" framed a new conversation about civic engagement. In it, he asserted that Americans are becoming disengaged from each other and from our communities – rather than connecting to those around us, we are choosing to do alone activities that once were done with teams or groups.

Position 2: Fortify and amplify. This is where the debate has already been set in motion, and the terms are favorable to your objective. You can stick with the existing terms of the debate and spend the majority of your efforts reinforcing them, because the discussion is going well and people are agreeing with you, and there is no reason to spend the time and money required to shift the conversation.

Advocates of Smart Growth find themselves fortifying a winning frame. When the debate over urban sprawl began to heat up in the 1990s, environmental groups did an excellent job of framing the conversation. When pro-development groups attempted to paint environmentalists as anti-growth, they responded by saying they were not against growth, and in fact they were for smart growth. Today, this frame continues to be successful for environmental groups, and thus they continue to fortify and amplify it, because it is largely opposition-proof: If you are against smart growth, what are you for... dumb growth?

Position 3: Reframe. If you are losing the debate and there is no way to win within the existing frame, it's time to switch gears. Occasionally, groups make the mistake of continuing to fortify and amplify a losing debate. Groups keep thinking that with one more report or one more fact sheet the tide will turn and people will start to embrace their position. Sometimes this just isn't the way to talk about an issue. You tried it and now need to cut your losses. By changing the frame, you can create space for a new, more productive conversation. But remember that reframing is often an uphill battle – it takes a lot of time and money, consensus among many organizations and spokespeople, and patience. People like the president of the United States might – but not always – be able to reframe an issue more quickly and easily because their sphere of influence is so great. But for most groups, reframing requires a multi-year commitment.

For many years, gun safety advocates advanced new policies limiting the sale and possession of weapons with a "guns kill" frame. But for gun-rights groups, this was a losing frame. So they executed a very successful reframe by shifting the conversation from "guns kill people" to "people kill people," a frame that emphasizes individual responsibility. This was a gradual shift that took several years and significant communications investment from powerful organizations like the National Rifle Association and others.

STOP: Go to the chart and complete Step Two by filling in your internal and external scans and determining your position.

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STEP THREE: STRATEGIC CHOICES

Now you must decide who your target audiences are and what they care about, how you are going to approach them, what you are going to say to them, and who is going to say it.

1 AUDIENCE

Who are the people who can move your decision maker(s) and help you achieve your objective? The more clearly you define your audience, the more strategic you can be about reaching that audience. You can segment your audiences by demography, geography and other categories relevant to your work. Examples of well-defined audiences include: urban males under 25 who own a truck; suburban soccer moms; business-men who travel frequently; or family farmers in the Midwest. The key is to segment your audiences into the narrowest categories possible. How you reach each different audience will be dramatically different based on a variety of factors, such as their interests and where they get their information about your issue. You can have several target audiences, but you should develop a different strategy to reach each audience. (You'll note the attached Smart Chart is divided into columns to help you do just that.)

In some cases, your target audience might be the same as your decision maker. For example, if your objective is to lower smoking rates in your town, both the decision maker and the target audience would be smokers, as they are the only ones who can decide to put down the cigarettes. In other cases, you might target audiences that can help you influence the decision maker. For example, if your objective is to pass a law for smoke-free restaurants and bars in your town, and the city council is the decision maker, you might select voters in a key council district who can help persuade their elected council member to vote yes. The focus is on the audience(s) with the greatest influence over and access to the decision maker. Think about this in your strategy: if your objective hinges on a decision maker with whom you have little access or influence, you must rely on a well-chosen target audience to help you persuade that decision maker, since you aren't well-poised to appeal to them directly.

The "general public" is not a target audience.

Do not target the general public. The general public means everyone, and thus you have failed to target anyone. It will also be impossible to find generic messages that resonate with everyone. The result will be watered-down messages that don't move a soul, particularly in today's crowded marketplace of ideas. You must target a specific, definable audience.

The media is not a target audience. Media outreach is generally a means to an end – a tactic to reach other audiences. You can list media relations activities in Step Four.

The target audience is likely smaller than you think. When it comes to moving an issue, there is no pre-determined magic number of voices that will guarantee victory. But the number of people needed to make change is not necessarily "as many as possible." Small numbers can make big things happen – the trick is to identify the right audience to help you achieve your objective. The smaller the target audience, the easier it is to create focused communications that will move the audience to action.

Audiences that serve as a social reference group on the issue – the people other people look to when forming their opinions – can often be a good target. For example, when Human Rights First wanted to persuade the Bush administration to set clearer policies on interrogation of terror suspects in military custody, it selected retired military leaders as a key audience to activate on the issue, since many Americans defer to this group on military policy based on their experience and trusted positions of leadership. Targeting audiences that are likely to bring along others is a smart way to communicate with a small number of people but end up with large numbers of supporters. Also, select audiences that are willing to publicly show their support. Whether it's posting a bumper sticker on their car or wearing a t-shirt, public proclamations are incredibly important to building the perception of broad support for – and in turn attracting others to – your issue.

Finally, focus on those you can persuade. It might seem obvious, but too many organizations are seduced into answering their opposition instead of targeting audiences that might be on the fence, but would support their issue with a little thoughtful outreach.

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2 READINESS

Start to think about the issue from your audience's perspective. Where is your audience when it comes to your issue? Are they ready for what you want to tell them? The most effective messages are designed to meet your audience where they are, and move them toward your point of view. Think about your communications in stages – sharing knowledge, building will and reinforcing action.

- Stage 1: Sharing knowledge. People need basic knowledge on the issue before they can even consider acting on it. In this stage, the task is to share information on the issue without overwhelming the audience. You want to help the audience develop a personal connection to the issue so they care – make the issue relevant by appealing to their values and lifestyle, or by connecting the issue to their family, friends or community. With your information, you also want to share empowering solutions, so people feel they can help make a difference.

- Stage 2: Building will. Building the will to act means overcoming the barriers your audience may have. In this stage, you are no longer sharing information. Instead, the task is to ease the audience's perceived risk. You can overcome the barriers by respecting the audience's comfort zone and asking them to take a manageable action that fits their lifestyle. You can also show them a leader taking action first, or position the action as the social norm. You must offer hope for positive change, and show that the benefits of taking action outweigh the risks. Position your audience as the hero – not the villain – who can take action to make a difference.

- Stage 3: Reinforcing action. Once people have taken action – even a small one – on behalf of your issue, reward them for doing the right thing. Remind them that they've done a good thing, and they'll be much more likely to act on your behalf again next time you ask. In this stage, the task is to celebrate your victories with the people who helped make them happen.

(For more information on these stages of persuasion, see the full Activation Point report at www.activationpoint.org.)

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3 CORE CONCERNS

As you continue to think about your issue from the perspective of your target audience, the next step is to figure out what will compel the audience to move toward your objective. What do they already believe about the issue? You must be respectful of their thoughts and opinions on the issue. And you can connect with their existing beliefs to build a bridge to your ideas and help them see your issue as personally relevant. People care more about an issue when it's packaged in a way that aligns with their values.

Remember: This is about their value system, not yours. You cannot assume that if people know what you know, they will do what you do. Many people know that big cars have high emissions levels, but they choose to drive them anyway. Perhaps big cars make them feel safer. Perhaps smaller cars do not provide them enough cargo space. An effort to get people to switch to low-emissions cars must address these concerns. If you want to connect with your target audience and make them your ally, you need to understand how they think and determine what lens they use to make decisions. It is always easier to tap into a value someone already holds than to create a new one.

For example, The Justice Project works to reform the death penalty system. Its policy objective is: Reduce mistakes in the death penalty system by providing DNA testing and qualified counsel. Its target audience is federal policymakers – specifically members of the House and Senate judiciary committees – who can help reach its objective.

The Justice Project needed to find a way to persuade key policymakers to side with it on an upcoming vote. Research showed that neither the economic argument (execution costs more than lifetime imprisonment) nor race statistics (minorities are more likely to receive the death penalty) were compelling enough to sway their audience.

The Justice Project found that the best way to persuade its target audience was to focus on innocence. The majority of its target audience agreed innocent people should not be sentenced to death. Armed with statistics showing an increasing number of people being exonerated from death row, the Justice Project was able to appeal to a value its audience already had (it is wrong to kill innocent people) and start a conversation about how to keep wrongful convictions from happening. And at that point, reform became possible.

Tap into your audience's existing concerns to help make the issue personal to them. Take it from these focus group respondents:

- "If you're reaching out for my help...understand that I'm busy, that I have a life, that there are lots of things that are important to me. If you do that, I'll be more apt to listen to your message."
- "The most important thing is relevance – the things that directly affect your life and the people you care about. That makes acting worthwhile."

You must also identify the barriers that might prevent your audience from hearing what you have to say. People have a long and varied list of reasons for not taking action. To really be heard, you must anticipate and overcome those barriers. In some cases, you might be asking your audience to step outside their comfort zone – understanding the risks and rewards your audience associates with your issue can help you have a much more productive conversation.

Consider the lifestyle of your audience. The best way to make it easy for audiences to engage with your issue is to ensure it fits with their lifestyle. For example, the annual Race for the Cure attracts hundreds of thousands of people who get up early to run a race to raise money to cure breast cancer. But there are plenty of people who will never get out bed at the crack of dawn on Saturday to run a race. For those people, the Susan G. Komen Foundation offers an option more in line with their lifestyle: Sleep in for the Cure. Participants still pay the registration fee that benefits the charity, and receive a t-shirt to honor their participation, which they can proudly wear as they support the cause from under the covers.

You may identify numerous persuasion possibilities. Once you've made your list, review your objective and target audience, as well as your internal and external scans, and then decide on the concern to tap and the barrier you'll need to overcome. Make the choice of which concern to tap based on what will be the most motivating to the audience, and what you can legitimately link your issue to – if it seems like a stretch, rethink your choice. If you've identified multiple barriers that might prevent your audience from engaging, choose the deal breaker – one that's most important to overcome to keep them in the conversation.

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4 THEME

Theme is the big picture you want to convey to the audience on the issue—it defines how you'll approach the conversation with your audiences.

In anti-smoking campaigns, a number of themes have been used to reach different audience segments with different values. One makes big tobacco THE BAD GUY. The Truth campaign does this by showing kids how they are being manipulated by big tobacco. The Campaign for Tobacco Free Kids also used this theme, exposing tobacco companies' marketing plans to make cigarettes appealing to kids.

Another approach is to VILIFY SECOND-HAND SMOKE. Gasp.org is very aggressive and runs creative campaigns that say, "Smoking hurts babies," and, "You smoke, I choke." Breathing Space's Take It Outside campaign is softer and asks parents to protect their children, and if not stop smoking altogether, at least take it outside so as not to expose the child.

A third approach is to focus on how smoking makes teens LESS ATTRACTIVE. Smoking is Ugly is an effort by Christy Turlington to show teens how ugly smoking makes them look. A number of teen Internet sites highlight statistics that show teen smoking makes you smell, is grosser than picking your nose, and gives you bad skin and bad breath.

Three different themes: make tobacco the bad guy, vilify second-hand smoke, and show how smoking makes you less attractive. Different themes to reach different audiences toward the same objective of reducing smoking, with each theme dictating very different messages and messengers. The key is to select a theme that springs from the audience's values, not yours.

Consider the tone as well. An optimistic tone can help empower and motivate your audience. Hope is also an incredibly powerful incentive for a person to engage with your organization – a sense of hope, of possibility, enhances a person's desire to help.

And remember, different themes might emerge from the same value. For example, the Smoking is Ugly campaign featured a model to appeal to teen girls on their value of looking attractive. That value could have been approached in a number of ways, each one prompting different themes. For a positive-toned theme on the same value, one ad stated "Tobacco Free: It's a beautiful thing." A 1980 campaign featured a woman with cigarettes sticking out of her ears with the tag line "Smoking spoils your looks." All three efforts appeal to the same value, with slightly different themes. The key is to figure which theme will work best for your audience. And once you pick a theme, you must stick with the same theme throughout your communications efforts.

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5 MESSAGE

By now you know who you want to reach, how you might persuade them, and what theme you will use. Now you need to decide what to say. Again, it is important to consider your audience's value system, not your own. Review the persuasion points you identified above. Keep in mind these words of wisdom: "It's not what you want to tell them, it's what they can hear."

The message should resonate with the target audience. To test your message, ask:

- Is it based on the audience's core concerns?
- Do you overcome – not reinforce – their barrier?
- Is the ask in the audience's comfort zone? If not, does the benefit offered outweigh the risk?
- Does the message offer a vision or emphasize a personal reward? Does it convey hope toward success?
- Is it consistent with the theme throughout?

No MY-EYES-GLAZE-OVER words or phrases in your messages.

For an anti-litter effort in Texas, campaigners targeted young men who didn't really care about the environment or littering – but did carry enormous pride when it came to the Lone Star state. Keeping this value in mind, campaigners built messages that focused on the theme of state pride rather than littering. "Don't Mess with Texas" became a rallying cry about Texas rather than litter, and was ultimately an enormously successful effort.

A message is not a re-worded mission statement.

6 MESSENGER

Who delivers your message is just as important as what you choose to say. The right message delivered by a messenger with no credibility with your target audience will likely fall on deaf ears. For the Give Swordfish a Break campaign – aimed at securing a swordfish recovery plan to help plummeting stocks – organizers determined that environmentalists alone were not the most effective option for reaching decision makers within the federal government or for activating a new segment of the public to stop consuming unsustainably harvested fish.

Through research, organizers found that seafood consumers listen to and trust food purveyors – and especially chefs – with information about what they should or should not eat. Similarly, chefs had strong credibility with government decision makers as a new voice of expertise in the debate because many could report from firsthand experience that the size of swordfish at docks and fish markets had declined over the years. Chefs had the credibility the effort needed. They resonated with the target audiences and became highly effective spokespeople. Environmentalists alone could not have delivered the same message and had the same impact.

People listen to people more than institutions. According to the 2006 Edelman Trust Barometer survey, 68 percent of US opinion leaders trust "a person like me" as the most credible source of information.

"The lack of trust in established institutions and figures of authority has motivated people to trust their peers as the best source of information." – Richard Edelman, president and CEO, Edelman, a public relations firm.

STOP: Go to the chart and complete Step Three by filling in each of your strategic decisions. Be sure to give each decision a reality check using the tips provided.

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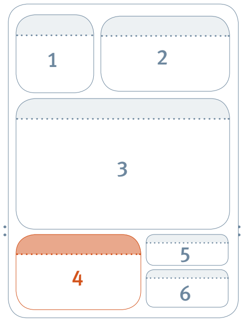
STEP FOUR:
COMMUNICATIONS ACTIVITIES



In this section, your communications strategy starts coming together as you identify tactics, plot them on a timeline and assign key tasks to the people who will help implement your strategy.

Tactics: Once you've made all the preceding strategic communications decisions, then you can pick the communications tactics that will work best. These need to take into account your objective, internal and external scans, audience target, and message. The communications tactics are how you carry the chosen message to the chosen audience. Tactics can include meetings, Web sites, newsletters, a press conference, letters, phone calls, paid advertising, or other means for getting your message out to your audience.

The best communications efforts use the most direct tactics possible. For example, you shouldn't bother with a full-scale advertising campaign to reach your organization's members when you can reach them directly through a newsletter or email appeal. The tactics should also be appropriately chosen for your target audience. For example, using Facebook or MySpace to reach teens is a great idea, but using those Web sites to reach seniors is not. Your tactics should always be in line with your objective, and they should match the theme and tone you've chosen for your communications.

Above all, the tactics should be realistic. Better to have a handful of smart, well-executed activities than to over-extend and end up with many tactics but little impact.

Timeline: Now that you've determined the activities in your communications strategy, begin to plot out the timing. Be sure to note natural communications opportunities when your audiences are more likely to be attuned to and act on the issue, like back to school or breast cancer awareness month. Then think about the opportunities you can create for yourself through events, earned media, and other activities. Plan ahead for the unexpected – sometimes events beyond your control can present a chance to connect with your audiences on the issue. And be realistic: you can't communicate with audiences 24/7. Your organization probably can't sustain it, and you run the risk of compassion fatigue when your audiences grow weary of hearing from you.

Consider other organizational commitments like board meetings and big fundraisers to ensure your communications effort gets the attention and focus it needs. Begin to integrate your communications strategy into your overall work plan.

Assignments: The biggest step toward putting your strategy into action is to assign key tasks to the various people who will help you implement your strategy. What staff, volunteers, coalition partners and other key players will take part in your communications operations?

Budget: Time and money are finite resources. Think carefully about how much of each you will allocate for the implementation of your strategy. Be realistic about what you can accomplish given the people and dollars available to support your effort. Your internal scan may have information about your capacity.

STOP: Go to the chart and fill in possible tactics to reach your key audiences, as well as timeline, assignments and budget. Only write down viable tactics. You can change or add tactics as your effort moves forward.

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STEP FIVE:
MEASUREMENTS OF SUCCESS

As you implement your strategy, you'll want to monitor your progress along the way. Identifying both quantifiable and anecdotal ways to measure success helps you signal progress throughout your efforts to internal audiences like staff and volunteers and to external audiences like funders and policymakers.

The measures can be a mix of outputs and outcomes. Think of outputs as measures of your efforts, the things you are doing to move your strategy forward. Outcomes are the changes that occur because of these outputs. One output might be generating more news articles carrying your key messages in outlets that reach your target audience. One outcome might be that your target audience saw the news coverage and, based on the coverage, invited your organization to testify at an upcoming hearing or stopped purchasing unsustainable products.

Measurements need to be defined and reviewed throughout the communications program. Don't wait until the end. The whole point is to make sure you are getting your messages to the right audiences and getting those audiences to do what you want. If this isn't working, you need to know ASAP so you can save time and money by revising and refining your strategy. Revision is a reality of communications efforts. Don't be afraid to review and reconfigure your efforts. This is smart to do, and charting measurements of success can help.

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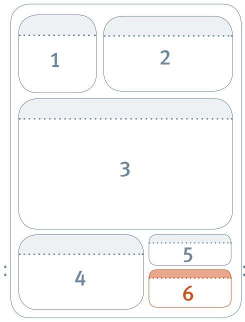
STEP SIX:
FINAL REALITY CHECK



Test your strategy before you put it into action. All the strategic decisions should align to create a consistent approach. Make sure your logic holds up to scrutiny before you begin to invest time and money in your strategy. Examine the rationale behind your strategic decisions and test your reasoning to ensure your choices are sound.

- ☐ Is the strategy doable?
- ☐ Are your resources in line with your strategy? Does your internal and external scan support the decisions you've made?
- ☐ Are you motivating the right people to take the right action at the right time?
- ☐ Are your choices consistent? Does the logic flow from one box to the next? (Tip: Try testing your decisions backwards–i.e., by accomplishing these tactics using these messengers, we will deliver these messages, support this theme, tap into these values, move this target audience, etc. Does the logic work as well in reverse as it did when you worked through the chart? If not, go back and address trouble spots.)
- ☐ Will the tactics move you toward your objective? Will they reach the appropriate audience(s)?
- ☐ Are you using the best persuasion practices, such as respecting the audience's lifestyle, sharing hope, making them the hero, positioning the issue within the social norm, etc.?
- ☐ Are there any assumptions or guesses built into the plan that require further research to confirm or correct?
- ☐ Is there buy-in from your organization to implement the plan?
- ☐ Are there other objectives you need to Smart Chart to ensure you're taking a comprehensive approach to meet your overall goals? Several Smart Charts can combine together to help you craft your overall communications plan.
- ☐ Can you measure progress?

If you answered no to any of these questions, go back and work through your choices again. Run all of your strategic decisions through this screen whenever you update or adjust your strategy. You can also tailor this list based on your communications strategy and use it to assess tactical ideas as they are presented.

STOP: Go to the chart to fill in your measurements of success and use the checklist of questions to test your strategy.

Ready, Set, Go...

Now it's your turn. Develop an upcoming or current communications effort by using the Smart Chart 3.0. You can also use the tool to evaluate past efforts.

Important reminder: Make your choices in order as you follow the chart. Each decision you make will affect all the rest of your choices and decisions.

Good luck and have fun.

Note: This guide highlights examples of organizations that have used communications to educate segments of the public as well as policymakers. You should be clear that communications efforts that involve specific legislation could constitute lobbying and must be accounted for according to lobbying laws that govern 501(c)(3) activity. The examples in this guide are only to illustrate points and are not intended to advocate for specific legislation.

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The Smart Chart was created for the Communications Leadership Institute by Spitfire Strategies.

Spitfire Strategies provides strategic communications solutions to promote positive social change. Our objective is to help social change organizations use their voice in a strong, clear and compelling way to articulate their vision of a better world. To learn more about Spitfire Strategies, or download additional copies of the Smart Chart, visit our Web site at www.spitfirestrategies.com.

The Communications Leadership Institute (CLI) is a nonprofit organization dedicated to providing nonprofits with the training and tools they need to increase their communications capacity and use high-impact communications campaigns to achieve their goals. CLI offers the gold standard in communications training so nonprofits can use their voices in the most powerful way possible. For more information, visit www.communicationsleadership.org.

Spitfire Strategies and CLI wish to thank the many people who helped bring this publication to life.

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SMART CHART 3.0

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1 STEP ONE: Program Decisions

Broad Goal: What do you want to achieve over the long term?

Objective: What's the first measurable step you need to accomplish within the next 12 months to move toward your goal?

Decision Maker: Who can make your objective a reality by taking a specific action or changing a specific behavior?

2 STEP TWO: Context

Internal Scan: What are your organization's assets and challenges that may impact your outreach strategy (budget, staffing skills, resources, reputation, etc.)?

Assets:

Challenges:

External Scan: What is already happening outside your organization that may impact your strategy (e.g., timing of the issue or events, activities of other organizations in this space, barriers audiences may face to taking action, other potential obstacles or opportunities)?

Assets:

Challenges:

Define Your Position: Do you need a plan that will frame, fortify and amplify or reframe the debate?

- ☐ Frame (no one is talking about your issue)
- ☐ Fortify and Amplify (you like the direction the debate is headed and want to push it further)
- ☐ Reframe (you want to change the discussion about your issue)

3 STEP THREE: Strategic Choices

Decisions to Make	Audience 1	Audience 2	Audience 3	Reality Check
Audience Target: Who must you reach to achieve your objective? (There's room to describe three audiences here. You may not have that many or you may have more.)				Who can most help you achieve your objective? Who can you persuade? Think small – segment your audiences as much as possible. This is not the general public. Your audience may be your decision maker, or it may be people who can help influence your decision maker.
Readiness: Where is your audience on your issue? Are they ready for what you want to tell them?	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	☐ Stage 1: Sharing Knowledge ☐ Stage 2: Building Will ☐ Stage 3: Reinforcing Action	If they don't yet know about, care about and believe in your issue, check Stage 1. If they know, care and believe – but aren't ready to act – check Stage 2. If they've already taken action and are ready for the next steps, check Stage 3.
Core Concerns: What existing belief or value can you tap into to engage and resonate with your audience? What existing belief might be a barrier you have to overcome?	Value: Barrier:	Value: Barrier:	Value: Barrier:	What does the audience believe? Where's their comfort zone? Note lifestyle considerations (e.g., to get parents to an evening meeting, you may need to provide childcare). Understanding these factors will help you make the issue personally relevant for the audience.
Theme: Your theme will guide solid messaging that reaches your audience and reinforces the core concern you want to tap. For example, if your audience's core concern is their pocketbooks, your theme might be "we can't afford not to invest."				Select a theme that matches the audience's values, not your own. Offer hope for change. Consider the emotion you want to evoke and the tone you want to strike. Happy, mad, excited and hopeful are all motivating emotions while emotions like guilt, shame or fear tend to be disempowering.
Message: What key points do you want to make with each target audience?	See reverse side of this chart to fill out your message boxes	See reverse side of this chart to fill out your message boxes	See reverse side of this chart to fill out your message boxes	Make sure your messages: • Are based on the audience's core concerns; • Overcome – rather than reinforce – their barrier; • Have an ask that is in their comfort zone (or offers a benefit that outweighs the risk); • Emphasize reward and convey hope toward success; and • Are consistent with your chosen theme.
Messengers: Who will best connect with the audience? Who is their social reference group on your issue? Can you show them a trusted leader taking action?				People listen to people, not institutions. Make sure your messenger is credible. The right message delivered by the wrong messenger may fall on deaf ears.

4 STEP FOUR: Communications Activities

Tactics: What activities will you use to deliver your messages to your target audience(s) (e.g., meetings, Web sites, newsletters, press events, letters, phone calls, paid advertising)? Don't forget to consider organizational capacity.	**Timeline:** When will you implement each tactic? Note key dates, deadlines and events. Be realistic – you can't communicate with audiences 24/7. Note natural opportunities when your audience is most likely to be attuned to and act on the issue. Plan ahead for the unexpected – sometimes events beyond your control can be a chance to connect with your audiences. Use a timeline to plot out all the steps that go into each tactic listed.	**Assignments:** Who will implement each activity noted in the timeline?	**Budget:** How much time and money will you spend on each tactic? Be realistic about what you can accomplish given available resources.
Audience 1: Tactics:			
Audience 2: Tactics:			
Audience 3: Tactics:			

5 STEP FIVE: Measurements of Success

Outputs: What will you produce to reach your objective (e.g., emails sent, events planned, phone calls made)?	**Outcomes:** What is the result of your outputs that demonstrates incremental progress toward your objective (e.g., increased donations, positive editorial, new members)?

6 STEP SIX: Final Reality Check

Before you put your chart into action, test for accuracy by asking yourself the following questions:

- ☐ Is the strategy doable?
- ☐ Are your resources in line with your strategy? Does your internal and external scan support the decisions you've made?
- ☐ Are you motivating the right people to take the right action at the right time?
- ☐ Are your choices consistent? Does the logic flow from one box to the next? (Tip: Try testing your decisions backwards – i.e., by accomplishing these tactics using these messengers, we will deliver these messages, support this theme, tap into these values, move this target audience, etc. Does the logic work as well in reverse as it did when you worked through the chart? If not, go back and address trouble spots.)
- ☐ Will the tactics move you toward your objective? Will they reach the appropriate audience(s)?
- ☐ Are you using the best persuasion practices, such as respecting the audience's lifestyle, sharing hope, making them the hero, positioning the issue within the social norm, etc.?
- ☐ Are there any assumptions or guesses built into the plan that require further research to confirm or correct?
- ☐ Is there buy-in from your organization to implement the plan?
- ☐ Are there other objectives you need to Smart Chart to ensure you're taking a comprehensive approach to meet your overall goals?
- ☐ Can you measure progress?

If you answered no to any of these questions, go back and work through your choices again. And remember, you may have other objectives you need to Smart Chart separately to ensure you're taking a comprehensive approach to meet your overall goals.

1 MESSAGE BOX

Audience 1:

Value:

Barrier:

Echo Vision

Tap Value

Ask

Overcome the Barrier

To access the Smart Chart 3.0 Communications planning tool, turn page and fold down.

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2 MESSAGE BOX

Audience 2:

Value:

Barrier:

Echo Vision

Tap Value

Ask

Overcome the Barrier

3 MESSAGE BOX

Audience 3:

Value:

Barrier:

Echo Vision

Tap Value

Ask

Overcome the Barrier