



# PLAN THE WORK

Strategic Communication Planning for  
Not-for-Profit Organizations



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## About this Handbook

*This handbook was originally developed to accompany a two-day workshop. It has been revised and edited to work as a resource guide for any not-for-profit organization that wants to develop a communication plan, but does not have any experience doing this kind of work.*

## INTRODUCTION

IMPACS has been supporting Canadian not-for-profit organizations to develop communication plans since 1997. Through this experience we have identified that the most common impediment to an organization's ability to develop a strategic communication plan is lack of time. Since communication planning is rarely written into anyone's job description, it is an easy target for never becoming an organizational priority. In many not-for-profit organizations, communication planning is handed over to a volunteer board committee, where the process often loses momentum.

One of our objectives in developing this communication planning handbook was to create a model that accommodates the very real time restrictions most not-for-profit organizations have to do this planning.

The second impediment most not-for-profit organizations face when they consider developing a communication plan is lack of experience in this specific area. Thus, our second objective was to create a tool unlike any that we have seen: a communication planning handbook that not only explains *what* areas of information need to be gathered and evaluated, but one that also provides concrete suggestions for *how* to gather that information.

The approach we have developed will require one person, either staff or volunteer, to assume the role of the "Communication Plan Facilitator" or "Communication Plan Manager." We hope that the person who is attending this workshop will be that person. The structure outlined in the following pages has been developed to move you step-by-step through the whole process, with a time commitment of about four hours a week, which, according to our research, is the average amount of time most people said they could dedicate to this work. That said, a good part of the facilitator's or manager's four hours a week will be spent getting others engaged in the process.

This serves our third objective: to engage as many people as possible in the planning process. Why? Because staff, board and supporter buy-in is critical to the success of your plan — especially if your planning process identifies success as being dependent on changes to the status quo. Without full support from the staff and volunteers who need to implement the strategies and tactics identified in your communication plan, the plan will likely never be implemented. Without full support from the volunteers who set your organization's policies and organizational direction, the plan may never be approved for

implementation. Without full support from the donors and funders who financially support your organization's activities, the plan may never be implemented.

And so, rather than handing you a "cookie cutter" communication plan template that one person from your organization could take away and stamp into a limited variety of situations, we have provided you with a complete communication planning cookbook.

The document has been divided into two sections:

1. Facilitator's Communication Planning Guide
2. Facilitator's Support Materials

### **Facilitator's Communication Planning Guide**

The *Facilitator's Guide* in this handbook will provide you with all of the tools you should need to create a communication plan that is truly tailored to your organization's unique strengths, needs and challenges.

### **Facilitator's Support Materials**

This handbook includes a variety of materials that will support you in the development and implementation of your communication plan, including four complete, sample communication plans from other not-for-profit organizations.

## Why Strategic Communication Planning Matters

Experience has taught us that there are several basic approaches that will help any group maximize communications impact. The key is to focus your organization's resources like a laser beam on just a few specific and carefully selected communications opportunities. In the simplest terms, effective communications has three overarching rules:

1. Define success
2. Know the context
3. Deliver the right message to the right audience at the right time, many times

Ultimately, it is really that simple. But dig a little deeper, and the questions can become almost overwhelming...

Which audiences are the “right” audiences?” What are the “right” messages for those audiences? Do you really know – or do you just *think* you know, because you really like the messages you've come up with? What is it you are asking those audiences to do? How will you know they've done it – and what's in it for them?

What are the most effective pathways for delivering your messages to your priority audiences? Is it the media? Face-to-face meetings? Direct mail? The internet? What should your strategies be for guiding that delivery?

And before you start setting your sights too low (or too high), what can you afford to do as an organization? What are your strengths and challenges, both internally and externally?

What barriers and opportunities will you face in the complex communications' environment when you try to “spread the word” about your good work and the urgency of the issues you address?

The answers to these questions are critical to your success, and to ensuring that your organization is on-track in meeting its broader goals and objectives in a timely, effective way. A strategic communications planning process will allow you to answer these questions and many more.

But *without* a plan to guide your communication activities, your organization runs the risk of focusing on the wrong audiences, of using messages that simply do not work outside of your own inner circle, or of getting lost in a flurry of activity that doesn't move you any closer to your goals. In other words, without a well-thought-through plan, your organization runs the risk of wasting time and money, losing credibility, becoming irrelevant with key audiences, even of failing to meet your mission.

In short, investing time and resources into a strategic communications planning process will help your organization:

- proactively focus the activities of your organization where there is the greatest potential for success;
- ensure your limited resources (time and financial) are most effectively applied;
- impose discipline and clear thinking about why it is in the best interest for your organization to pursue certain communications initiatives;
- integrate all of your public relations efforts: media, government, donor, corporate, etc.;
- ensure that everyone in your organization (staff, board, volunteers) is “on the same page” and telling the same stories about your organization;
- achieve results that move you towards realizing your organization’s goals; and
- encourage creative thinking about new ways to address old challenges.

## What is a Strategic Communications Plan?

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 identifies current situation.

A communication 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. It can be a summary document of only a few pages, or a manifesto of 40 pages or more. Part of the length and depth of a plan depends on whether it is a five-year organizational plan or a plan designed to support a particular campaign or strategic goal.

You can find an outline of a typical communication plan in Appendix A.

In the private and government sectors, communication plans are typically developed in support of very detailed organizational strategic plans. In the not-for-profit sector, it is most common to see strategic communication plans as a hybrid of both organizational and communication planning processes.

A cautionary note: while communication plans are written documents, they also need to be thought of as living documents. The reality is, the communication landscape is always changing, and new opportunities will continually arise for delivering your organization’s messages to internal and external audiences. And, as your understanding of the communication landscape – and your skills at manoeuvring through it – improve, your opportunities to get the message out will only increase. For these reasons, written communication plans should be revised regularly – at least quarterly - based on ongoing evaluation. And they should be constantly referenced.

## Beyond Media Relations

One common misconception about *communication* planning is that the mode of outreach will focus solely (or mostly) on *media* relations. Although earned or free media is a critical pathway to key publics for many organizations and issues, media is by no means the only way to reach all audiences. And for many specific communication initiatives, earned media is not appropriate at all.

Strategic and effective communication planning focuses on many different ways of reaching all of the external and internal audiences you will need to hear your message.

Additionally, the communication planning process considers not only your actual messages to those audiences, but your overall positioning, reputation and relationships in the broader community. In other words, a good communication plan also considers your organization's brand identity.

A thoughtful, creative communications plan for your organization, will improve your:

1. ability to create a strong and positive reputation for your organization — *public* relations;
2. profile in the community and your ability to attract the best staff, supporters and volunteers — *community* relations;
3. relationship and reputation with the media — *media* relations;
4. reputation with government at all levels — *government* relations;
5. relationship with employees and volunteers — *internal* communications;
6. ability to attract and maintain strong donor support — *donor* relations;
7. sponsorship and funding opportunities with business — *corporate* relations;
8. organization's policies and organizational direction — *board-staff* relations
9. outreach about programs and services you offer — *constituency and client* relations.

## Developing Buy-in for Your Strategic Communication Plan

Although one person should drive and coordinate the communication planning process within your organization, the process will be most effective if you involve key staff, board members, even funders and other important allies and supporters in its development. The ultimate success of your plan — that is, how effectively you can implement and then evaluate it — will largely be determined by the level of buy-in from your board and staff. And, as you probably know, buy-in is easiest to achieve when people have had a role in developing the plan and feel some level of ownership of the ideas contained within it.

If you expect to meet with some resistance from your board and staff to investing in communication planning, here are a few compelling reasons to bring them on-side. A smart, thoughtful process will:

- Build morale within the team.

- When you establish goals that your staff and volunteers understand and can meet, everyone is energized and ready to take on more ambitious goals.
- Establish evaluation criteria.
  - More and more funders and supporters want to know whether not-for-profits have been successful in their work. Defining success and setting clear benchmarks are key components of communication planning.
- Simplify priority-setting.
  - When you are faced with multiple communication opportunities having a communication plan will make it easier to determine where to allocate limited resources.

# FACILITATOR'S GUIDE



## Introduction

As the person managing the development of your organization's communication plan, your role is critical. Not only will you be responsible for keeping the process moving along, you will likely also be the one person within your organization who has participated in every aspect of information gathering for the plan.

One of your key roles in your capacity as the plan manager will be to facilitate group meetings, where staff, board and other stakeholders will come together to share information about different aspects of both your organization and the plan you are developing. As such, we thought it was important to provide some support on how to effectively facilitate these meetings. In the second section of this handbook, the “*Support Materials*” section, we have included details about how to plan and facilitate meetings, how to facilitate a creative brainstorm and how to facilitate a focus group: three tools that will be valuable to your planning process. We have also included four sample communication plans to inspire you — and to provide you with ideas about how you could adapt our model to best suit your organization's specific needs.

If, when reading through this section, you begin to feel overwhelmed by the number of meetings we have planned to support you — stop reading! Sit back and consider that the creation of your communication plan is a *process* as much as it is a project. The process may take as long as six months to get through. That is fine. Approach the process as a series of very easy to achieve benchmarks: the first meeting, short report for the plan; the second meeting, short report for the plan; and so on. (Remember the old saying: you can't eat an elephant in one bite!)

Creating these short reports on each section of your plan will serve another purpose. As your planning document increases in scope (and size), you should feel a sense of accumulated accomplishment, a feeling that you are really moving your organization forward. This feeling of accomplishment can play a significant role in encouraging you to continue your work to complete your organization's strategic communication plan.

## How to Develop Your Own Strategic Communication Plan

The following section details each of the different areas that you will be developing within your communication plan. Although the model we created relies on the participation of your staff, board and other allies and volunteers, any of these sections could be completed by one individual. We do not recommend this approach, however, since the ultimate success of your plan — that is, how effectively you can implement and then evaluate it — will largely be determined by the level of buy-in that key staff and board have for the plan. Buy-in is easiest to achieve when people have had a role in developing the plan and feel some level of ownership of the ideas contained within it.

All of the pieces of a communication plan are represented in the following pages. They have been laid out in a logical order: by moving from Organizational Goals to Situation Analysis to Audience and Messages, you will be building naturally from the most general

to the most specific areas of concern. We recommend that you try to fully complete each stage of information gathering before moving to the next one.

**Stage One — complete all of these pieces before moving to Stage Two**

- Organizational Goals (Defining Success) (*this should be the **very first** area you address*)
- Communication Objectives (Defining Success)
- Situation Analysis: Organizational Background
- Situation Analysis: External Environment

**Stage Two — complete both of these pieces before moving to Stage Three**

- Audiences (*these **must** be determined before you move to messages*)
- Messages

**Stage Three — complete both of these pieces before moving to Stage Four**

- Strategies (***must** be determined before you move to tactics*)
- Tactics

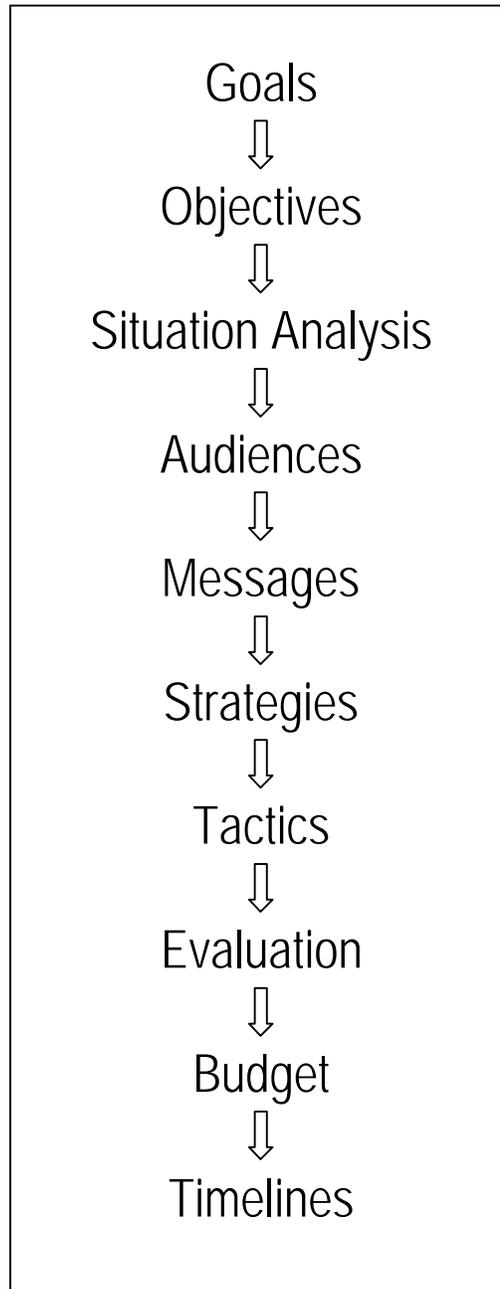
**Stage Four — complete all of these pieces before moving to Stage Five**

- Evaluation of Ideas for Strategies and Tactics
- Implementation Budget (*this is **helpful** to do before you invest time in developing the Timing and Timeline sections, in case you identify certain strategies and tactics require resources you don't have access to*)
- Timing
- Timeline

**Stage Five**

- Implement the Plan
- Evaluate the Results

## SECTIONS AND STEPS IN A TYPICAL COMMUNICATION PLAN



## DEFINING SUCCESS

Before even considering what your *communication* goals and objectives might be, you need to have a clear idea of what your *organizational* vision and goals are. If your organization has not clearly defined your overall vision, that is, how the world will look different once you accomplish your goals, then developing a strategic communication plan will be extremely difficult. For your communication work to be effective, you need to know exactly what you hope to achieve and why.

Since this handbook is focused on *communication* planning, we assume that your organization has already done the work of clarifying your vision and setting organization level goals. If this is not the case, we highly recommend you take a step back to build a solid foundation for your communication work by identifying the broad goals your organization hopes to achieve.

### How Will You Know When You've Succeeded?

In IMPACS' experience helping dozens of not-for-profits develop communication plans, we have found that "defining success" is often quite difficult for our sector. Quite often organizations want "to raise public awareness," or "to educate the general public." Unfortunately, from a communication perspective, goals as broad as these are extremely challenging. Why?

First, "to educate" is not a very clear goal. What does "educate" look like? How will education make the world look different?

Many people in the voluntary sector are rooted in a broad "conscious-raising" model of social change, believing that public awareness alone will lead to positive change on the ground. But the fact is, simply "informing the public" is generally not enough to get them to act or change their behaviour. There are countless examples of the public being educated on an issue – but not acting on that knowledge. It's more often the case that concrete change only comes about when those with the power to make decisions – whether they are individual consumers, donors, policy makers or business leaders – are motivated to take specific actions. The motivations could include guilt, votes, market positioning, or peer approval – it all depends on your audiences, and what you learn about them in the later stages of this planning process. In other words, "educating" does not easily lend itself to any kind of clear call to action.

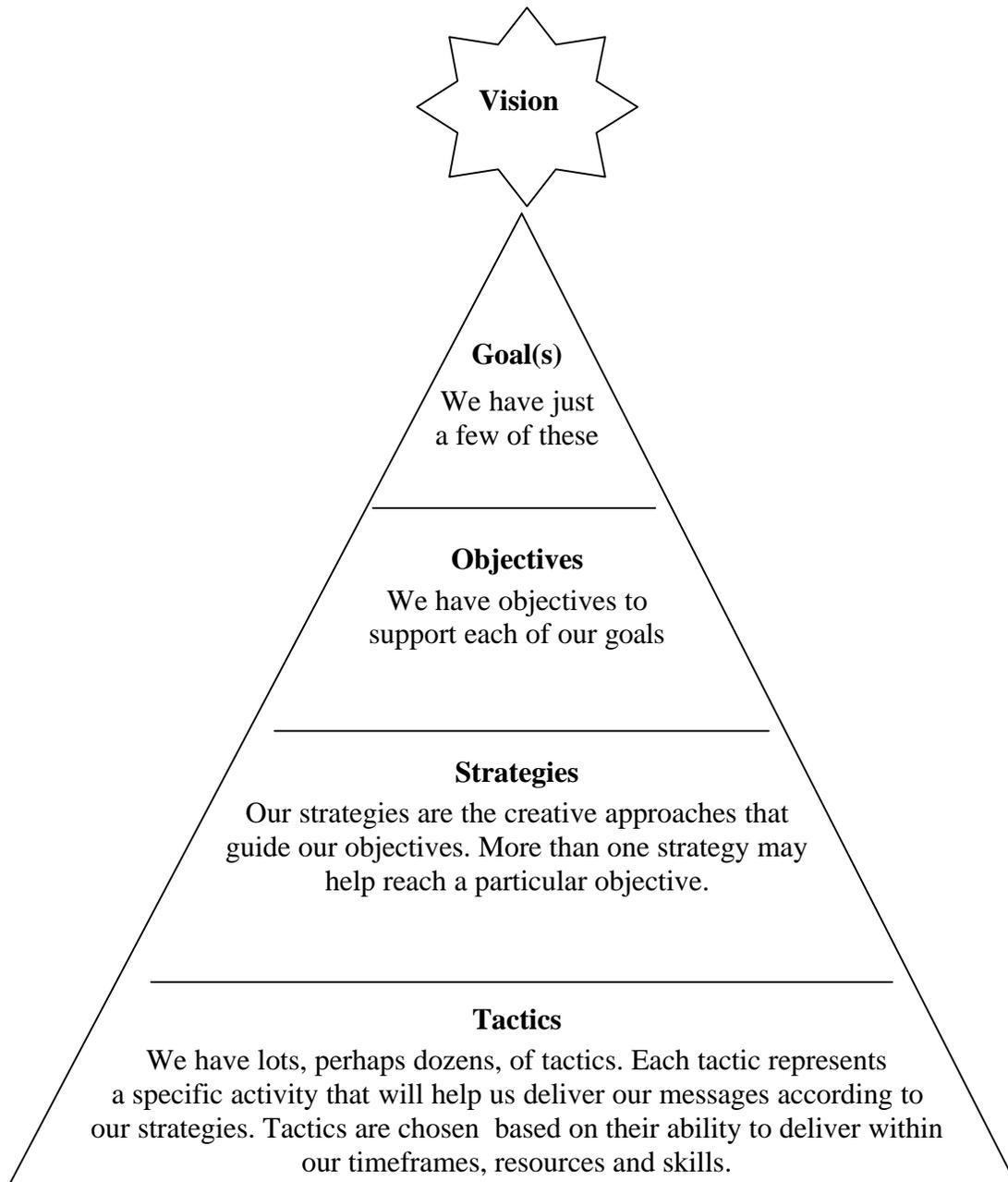
Also, "education" is not easily measurable. How will you know if your key publics have been educated? You can answer this question, of course, if you have the budget to do a poll or opinion survey before your outreach efforts, and then a follow-up poll afterward, but most organizations simply do not have the resources to do this kind of evaluation.

Third, educating the public is not easily achievable, particularly for larger populations. Virtually no not-for-profit has the resources to actually reach the "general public." With public relations and marketing budgets measuring in the millions of dollars, corporations like Nike, Coke and McDonalds may have the resources to achieve what marketers sometimes call "total market saturation." Possibly, the Canadian government does, although perhaps to a lesser extent. But the rest of us don't – and never will.

## A Word about Goals, Objectives, Strategies and Tactics...

One challenge facing all of us when we're developing communication plans is to develop a very clear understanding of the differences between goals, objectives, strategies and tactics. In our experience, dictionary definitions offer very little help clarifying these terms. "Goal" and "objective" are words that are used interchangeably, as are "strategies" and "tactics." In some cases, even "objectives" and "strategies" can be interchangeable – all depending on the scope of your thinking.

A visual distinction of how these four tools work together may be the best place to start:



Another way to visualize the relationship between goals, objectives, strategies and tactics is like this: keep in mind that goals support your vision, your objectives support your goals, your strategies support your objectives and your tactics support your strategies.

## GOAL(S)

What are your long-term achievements? What do you want to achieve to move your organization closer to fulfilling its mission?

### OBJECTIVE 1

What concrete, measurable, specific and achievable (within a certain timeframe) “targets” are you aiming at? These are shorter-term than your goals.

### OBJECTIVE 2

What concrete, measurable, specific and achievable (within a certain timeframe) “targets” are you aiming at? These are shorter-term than your goals.

### STRATEGY 1A

What is one general approach to achieving Objective 1?

### STRATEGY 1B

What is another general approach to achieving Objective 1?

### STRATEGY 2A

What is one general approach to achieving Objective 2?

### STRATEGY 2B

What is another general approach to achieving Objective 2?

### Tactic 1A-1

What specific tools will we use?

### Tactic 1A-3

What specific tools will we use?

### Tactic 1B-2

What specific tools will we use?

### Tactic 2A-1

What specific tools will we use?

### Tactic 2B-1

What specific tools will we use?

### Tactic 1A-2

What specific tools will we use?

### Tactic 1B-1

What specific tools will we use?

### Tactic 1B-3

What specific tools will we use?

### Tactic 2A-2

What specific tools will we use?

### Tactic 2B-2

What specific tools will we use?

## GOALS AND OBJECTIVES

It is important to discuss and set success benchmarks for *both* your organizational *and* your communication goals. Unless organizations consider them both, and develop distinct goals and concrete objectives, the two will likely remain confused, making it difficult to establish accurate success measures.

For instance, confusing organizational goals with communication goals can lead an organization to conclude that success may come in the form of having three stories about them appear in the local newspaper. But media relations is never be an end in itself. As noted earlier, earned media is not always the best means of reaching your key audiences. So, although generating media coverage is not a goal, it can be a fine strategy, if having a story appear in the paper serves to achieve some real change in your organization, such as recruiting new volunteers, attracting new donors, or attracting clients to a program.

Distinguishing between goals and objectives can be challenging because the terms are often used interchangeably. However, they are not the same. Goals are accomplishments that will make or leave some change in the world. One way to define goals is to answer the question, “once we have achieved our goal(s), how will the world look different?” Objectives are the smaller action items that naturally develop from your goal-setting process. Well-defined objectives are ideally specific, measurable, concrete *and* achievable within a specified time-frame.

So, if organizational goals and communication objectives are different, why address them at the same time? Simply, because most people don’t make the distinction clearly in their own minds, they move quite fluidly from one to the other. This is not a problem, as long as the facilitator has a clear sense of the difference between the big-picture organizational goals and the communication objectives that could ultimately assist your organization in achieving those goals.

Your organization’s goals and objectives are also the two areas of a communication plan that should include the entire board of directors and as many staff as possible in their development. The decisions made while discussing goals and objectives could have an impact at both an organizational policy level (typically a board responsibility) and on project implementation (typically a staff responsibility).

This piece of work will require two or three meetings of a couple of hours each. The agendas that follow are for three-hour sessions — the maximum length of time we believe you can spend working effectively on these two topics at one sitting.

If you expect to meet with some resistance from your board and staff to doing this piece of work here are a few compelling reasons to bring them on-side. By working together and defining what success looks like you can expect to:

- build morale within the team.
  - ▲ When you establish goals that your staff and volunteers can meet, everyone is energized and ready to take on more ambitious goals.
- establish evaluation criteria.
  - ▲ More and more funders and supporters want to know whether not-for-profits have been successful in their work. Defining what success will look like is one of the only ways to provide them with that information.
- set priorities, so that when you are faced with multiple communication opportunities, it will be easier to make hard choices about where to allocate limited resources.
  - ▲ For example, if someone proposes organizing a conference, your plan will allow you to determine if this activity will support your stated goals and whether other planned activities will have to be cancelled or postponed.
- have good cause for celebration when you achieve your stated goals.
  - ▲ If you don't set goals at the beginning of your planning process, you won't know when to celebrate. Many not-for-profits are unhappy at the end of their communications initiatives, feeling they could have done a better job. Rarely have those organizations defined, at the outset, what their goals were. Without an end-mark against which to evaluate your work, it is impossible to ever feel the thrill of success.
- identify the goals that are likely unachievable, before you invest resources in pursuing them.
  - ▲ Seeing what success will look like, on paper, and discussing this with others, will help you keep unrealistic expectations in check, identify where human or financial resources may be lacking and identify other obstacles that may impede your success.

## Facilitator's Briefing Guide

### Organizational Goals and Communication Objectives: Defining Success

#### Objectives:

- To develop a shared vision for the role of the organization within the community.
- To identify realistic and achievable short-term (one to three years) organizational goals.
- To identify realistic and achievable communication objectives to help meet the goals identified.
- To enlist board and staff support to engage in the required activities to achieve these goals and objectives.

#### Activities:

- Visioning exercise
- Brainstorms
- Group discussions

#### Props/ Materials:

- Flip chart paper, markers and tape
- Prepared flip chart with your organization's current goals (if you have clearly stated organizational goals)
- A summary of your organizational history and external environment can be helpful to put the discussion of goals in perspective. However, it may also act to limit people's ability to truly create a vision for the future. The challenge is that some participants may get "stuck" on what *has been done* and find themselves unable to focus on what *could be achieved*. Carefully judge whether the individuals within your group need this information.

#### Who to invite:

- Members of your board of directors
- Staff members
- Long-time and committed volunteers and advisors
- People who will bring a positive excitement to this stage of the planning
- Optimal number of participants: up to 12

#### Questions to consider

1. Why does your organization exist? Or, how would the world suffer were your organization to cease to exist?
2. How will the world be a better place once you achieve your organization's ultimate goals? Can you draw a picture of how this community will look different in one, three, five and/or ten years, after you have accomplished your goals? Be very specific and concrete.

## Sample agenda for a three-hour visioning exercise

### Organizational Goals: Defining Success

Timing (minutes)	Activity	Facilitator's Tip
10-20 (depending on group size)	Self-introductions of all participants	<p>Ask each participant to:</p> <ul style="list-style-type: none"> <li>➤ state their name,</li> <li>➤ how long they have been involved with your organization,</li> <li>➤ in what capacity, and</li> <li>➤ to complete the phrase, “I am committed to &lt;the name of your organization&gt; because...”</li> </ul> <p>Record the answers to “I am committed to &lt;the name of your organization&gt; because....” You may find them useful in your planning process when you reach the <i>Audiences and Messages</i> section.</p>
10	Overview of the meeting’s goals and agenda review	<p>Tell the participants what you hope to achieve during the meeting (such as the objectives noted on the previous page) and how you plan to use the information that is shared.</p> <p>Review the agenda. Ask if anyone has comments.</p>
5 (if set in advance) 15 (if set by the group)	Setting meeting rules	<p>Either develop these in advance, have them posted where everyone can see them and read them to the group with a brief explanation about each; or, ask the group to develop its own ground rules and post those. (See page xx for common meeting rules).</p>
5	Positive visioning	<p>Ask participants to close their eyes and visualize how your community would look different if your organization were to be successful.</p> <p>Ask them to be concrete and specific, to describe what impact an effective and strong organization will have in the community. What would be new? What would there be more or less of? Draw a picture of this vision.</p>
15-30	Group vision sharing	<p>Ask each individual to share their vision of a positive future. Do not allow any negative commentary about anyone’s vision. Record the main ideas of each person’s vision on flip chart paper and post these on the wall. Title the flip charts “What success looks like.”</p>

*If your organization has clearly stated goals that staff and volunteers already understand and agree to, go to Model A. If your staff and volunteers do not already strongly support the organization's goals, go to Model B.*

### Model A

Timing (minutes)	Activity	Facilitator's Tip
15-20	Discussion: organizational goals	Post your organization's current goals on the wall. Lead a discussion about your organizational goals and how those goals fit with the visions just expressed. Again, do not allow negative thinking.
30-40	Discussion: CSCC goals	Post the CSCC goals on the wall. Lead a discussion about how the CSCC goals fit with both your organizational vision and organizational goals. Identify the CSCC goals that have the greatest support (see page xx, <i>Facilitating a Creative Brainstorm, Step Two</i> ) and list them together on a separate flip chart.
15-20	Final discussion	Allow individuals in the group who have concerns about the visions of success, organizational goals or CSCC goals to share them at this point. As much as possible, let the others in the group respond to the concerns of their colleagues. Ensure people speak respectfully to each other and challenge <i>ideas</i> , not the <i>people</i> who proposed them.
15	Follow-up	Ask participants what they can commit to doing to support the continued forward movement of the CSCC strategy. Write these commitments down on flip chart paper so the whole room can see.
2	Wrap-up	Tell participants that you will take this information away and put it into a form that can be shared, considered and further discussed.
3	Thank-you's	Thank each person for participating in the meeting. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses.

**Model B**

<b>Timing (minutes)</b>	<b>Activity</b>	<b>Facilitator's Tip</b>
30-40	Discussion: organizational goals	Post your organization's current goals on the wall. Lead a discussion about your organization's current goals and how those goals fit with the visions just created. Again, do not allow negative thinking. Identify the organizational goals that have the greatest support (see page xx, <i>Facilitating a Creative Brainstorm, Step Two</i> ) and list them together on a separate flip chart.
30-40	Discussion: CSCC goals	Post the CSCC goals on the wall. Referring to the flip chart you have just created with the organizational goals that received the most votes, ask participants to compare the goals of your organization with the goals of the CSCC campaign. Try to find common ground that participants can easily identify.
15-20	Final discussion	Allow individuals in the group who have concerns about the visions of success, organizational goals or CSCC goals to share them at this point. As much as possible, let the others in the group respond to the concerns of their colleagues. Ensure people speak respectfully to each other and challenge <i>ideas</i> , not the <i>people</i> who proposed them.
15	Follow-up	Ask participants what they can commit to doing to support the continued forward movement of the CSCC strategy. Write these commitments down on flip chart paper so the whole room can see.
2	Wrap-up	Tell participants that you will take this information away and put it into a form that can be shared, considered and further discussed.
3	Thank-you's	Thank each person for participating in the meeting. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses.

## Facilitator's Briefing Guide

### Organizational Objectives: Defining Success

#### Objectives:

- To identify realistic and achievable objectives to help meet the goals identified in the previous session.
- To enlist board and staff support to engage in the required activities to achieve these goals and objectives.

#### Activities:

- Visioning exercise
- Brainstorms
- Group discussions

#### Props/ Materials:

- Flip chart, markers and tape
- Materials produced from the Visioning and Goal Setting session, as handouts and as flip charts

#### Who to invite:

- Everyone who participated in the Visioning and Goal Setting session
- Members of your board of directors
- Staff members
- Long-time and committed volunteers and advisors
- People who will bring a positive excitement to this stage of the planning
- Optimal number of participants: up to 12

#### Questions to consider

1. For each goal you have defined, what are the specific, concrete, measurable and achievable smaller “wins” or milestones that will take you a step closer to your goal?
2. How will you measure success? In other words, what will your benchmarks be? (For example: we will drive 1,000 people to our website and generate 100 faxed letters to a specific decision-maker; or we will add 20 new, active volunteers to coordinate our members to have at least 10 of them write letters to the editor whenever your issue appear in the paper.)

## Sample agenda for a three-hour visioning exercise

### Organizational Objectives: Defining Success

Timing (minutes)	Activity	Facilitator's Tip
10-20 (depending on group size)	Self-introductions of all participants	If this is the same groups as participated in the Goal Setting session, introductions may not be needed. If there are newcomers to the group, ask each participant to: <ul style="list-style-type: none"> <li>➤ state their name,</li> <li>➤ how long they have been involved with your organization,</li> <li>➤ in what capacity.</li> </ul>
5	Overview of the meeting's goals and agenda review	Tell the participants what you hope to achieve during the meeting (such as the objectives noted on the previous page) and how you plan to use the information that is shared.  Review the agenda and ask if anyone has comments.
5	Review meeting rules	Use the same meeting rules as the previous session. Post and read to group as a reminder. (See page xx for common meeting rules).
10	Review of commitments	If participants had made commitments to undertake certain actions, check in on progress of those commitments.
15	Review of Visioning and Goal Setting meeting outcomes	Post flip charts that were created in previous session. Read to group. Allow discussion, new ideas or concerns that may have arisen.
40-60	Discussion/brainstorm: communication objectives	Referring to the flip chart with the organizational goals, brainstorm objectives that could serve to help you achieve those goals. Make sure to define the characteristics of effective objectives before launching into the brainstorm. (See page xx). Do not allow negative thinking in this process. (See page xx for tips on facilitating a creative brainstorm).
15-20	Final discussion	Allow individuals in the group who have concerns about the visions of success, goals and objectives to share them at this point. As much as possible, let the others in the group respond to the concerns. Ensure people speak respectfully to each other and

		challenge <i>ideas</i> , not the <i>people</i> who proposed them.
15	Follow-up	Ask participants what they can commit to doing to support the continued forward movement of this process. Write these commitments down on flip chart paper so the whole room can see.
2	Wrap-up	Tell participants that you will take this information away and put it into a form that can be shared, considered and further discussed.
3	Thank-you's	Thank each person for participating in the meeting. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses.

## SITUATION ANALYSIS

The “situation analysis” section of any communication plan simply refers to understanding the context into which you will be delivering your messages. Once success has been clearly defined, it is important to understand the landscape in which communications will take place.

Much of this phase of the work involves research, or at the very least, gathering some of the key facts, trends and analysis around your organization and the issue you address. The understanding gained from this preparatory stage of the work sets the stage for everything else: audiences, communication strategies and tactics... it can also lead you to revisit some of your initial stated objectives.

Generally, a situation analysis will focus on:

- Organizational background
- Internal communications strengths and challenges
- External landscape: media, policy, public landscapes
- Allies and competitors or opponents

### Situation Analysis: Organizational Background

Taking the time to draw a comprehensive picture about how and why your organization was created will help you better understand why things have been done the way they have, and alert you to potential obstacles you may face as you create your organization’s communication plan. For this area of your communication plan, it can be helpful to consult with the “old-timers” from within your organization: veteran staff and volunteers, and founding board members.

## Facilitator's Briefing Guide

### Situation Analysis: Organizational Background

#### Objectives:

- To develop a shared organizational history.
- To shed light on how the organization got to the place it is today.
- To come to consensus on why things are done as they are and where there may be room to change the "status quo."
- To collect the information that will allow you to realistically assess your historic limitations and strengths which could have a major impact on your organizational goals, communication objectives, strategies and tactics.

#### Activities:

- Guided conversation

#### Props/ Materials:

- Flip chart, markers and tape
- Lap-top computer if you are using a typist to take notes
- Tape recorder if you are taking notes by hand

#### Who to invite:

- Individuals who have been involved with the organization for a significant amount of time
- Individuals who have a good sense of your organizational history
- Optimal number of participants: 6 to 8

#### Questions to consider

##### 1. History

- a. How old is your organization?
- b. Who created your organization? Why?
- c. How is your organization positioned generally in your community? Is it positive? Why or why not?
- d. Is your funding secure? Increasing, decreasing or staying stable?
- e. How have your staff or volunteer base changed over the years?

##### 2. Services

- a. What services does your organization currently provide in your community? Why?
- b. What services has your organization provided to the community in the past, that it no longer provides? Why did you stop providing these services?
- c. Are there other services you, or others in the community, think your organization should provide? Services that people have requested?

##### 3. Constituents/Beneficiaries

- a. What are all of the groups of people who benefit from your services (include not just those people who receive direct services from your organization, but volunteers, other not-for-profits, local business, etc)?
  - b. How many of each type of beneficiary do you serve or support?
  - c. Are you serving each of these groups in the way that they most need to be served? How do you know?
- 4. Function** (this is another way to think about the questions posed in question 3)
- a. What function do you perform?
  - b. For whom?
  - c. Why do you do this?
  - d. How do you do this?
- 5. Competition** (these questions sometimes overlap with questions around the “external environment”)
- a. Where do you fit compared to other similar organizations in your market?
  - b. Where does your market fit within the larger community?
  - c. Who delivers similar services?
  - d. How does your organization differ?
  - e. What could your organization learn from other similar service providers to improve your own service delivery?

## Sample agenda for a three-hour meeting

### Situation Analysis: Organizational Background

Timing (minutes)	Activity	Facilitator's Tip
20	Self-introductions of all participants	<p>Ask each participant to:</p> <ul style="list-style-type: none"> <li>➤ state their name,</li> <li>➤ how long they have been involved with your organization,</li> <li>➤ in what capacity, and</li> <li>➤ to complete the phrase, “I am committed to &lt;the name of your organization&gt; because...”</li> </ul> <p>Allow for 2-3 minutes per person.</p> <p>Record the answers to “I am committed to &lt;the name of your organization&gt; because...” You may find them useful in your planning process when you reach the <i>Audiences and Messages</i> section. They also may provide a spring-board for newsletter stories.</p>
10	Overview of the meeting’s goals and agenda review	<p>Tell the participants what you hope to achieve during the meeting (such as the objectives noted on the previous page) and how you plan to use the information that is shared.</p> <p>Review the agenda and ask if anyone has comments.</p>
5 (if set in advance) 15 (if set by the group)	Setting meeting rules	<p>Either develop these in advance, have them posted where everyone can see them and read them to the group with a brief explanation about each; or, ask the group to develop its own ground rules and post those. (See page xx for common meeting rules).</p>
30-45	Acknowledgement of the value of every person’s contribution to the growth of your organization	<p>This process may seem intimidating to some of the participants, especially if your organization has changed over its lifetime. Individuals who may have been part of creating your organization could feel either sad or frustrated at changes in direction they have seen, or may feel unappreciated now for the work they did in establishing your organization. It is critical that you create a space in which everyone, no matter how “historic” their contribution is, feels that what they gave to the life of your organization was of critical importance and is still valued. All decisions that were made in earlier times should be respected and acknowledged.</p> <p>Ask each participant to think of a time in the</p>

		<p>organization's history that made them feel proud to have been a part of the organization.</p> <p>Ask them to share their story (if appropriate, ask participants to respect the time for the meeting by keeping their story to about 5 minutes).</p>
60-90	Open discussion	<p>Guide participants through the questions that follow in the section titled, <i>Questions to Consider</i>. Focus on the questions that are most relevant to your organization's current situation. Ensure that every person is given space to talk. If one person dominates, take a 5-minute break and ask that person to help others share their stories. (Or use tactics described on page xx, <i>Respect Everyone's Rights</i>.)</p>
15-20	Final discussion	<p>Allow individuals in the group to each provide a closing comment that addresses the one piece of your organization's history that they feel is most important to keep sight of, or the one value that they would like your organization to always hold close.</p> <p>Record these comments, with the name of the person who raised them, on a flip chart for everyone to see. Add these comments to your communication plan. They may provide an excellent evaluation benchmark and rationale for new activities your organization may decide to undertake.</p>
15-25	Follow-up	<p>Ask participants to commit to what they can do to support the continued forward movement of this process. Write these commitments down on flip chart paper so the whole room can see. For example, if someone told a particularly powerful story, they may offer to write that story down so that it can be remembered by the organization and perhaps used to build your organization's profile in a media story or newsletter article.</p>
3	Wrap-up	<p>Tell participants that you will take this information away and put it into a form that will allow the organizational history to be protected and shared with new staff and board members, and with the community.</p>
2	Thank-you's	<p>Thank each person for participating in the meeting. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses.</p>

## Situation Analysis: Internal Communications Strengths and Challenges

Next, take a hard look at the resources, systems and skills available right now in your organization. Consider each of the following questions from the perspective of both strengths, or assets; and challenges, or weaknesses. Some early recommendations to bolster weak areas (or strong areas) may emerge in this early stage of your communication planning process.

This section of the communication plan can often be easily completed by one or two people. It need not be a group effort if the knowledge base is concentrated among known staff and volunteers. The output of these questions will help you establish the level of effort that will be required to implement specific strategies and tactics – which will be discussed imminently.

Questions to consider:

### 1. Positioning

- a. Does your organization have “access to podiums”? In other words, can one or more of your spokespeople easily access the media, decision-makers, potential funders or allies to deliver your messages?
- b. How have your past communication materials (newsletters, flyers, posters, brochures) been perceived with your audiences: What’s worked? What hasn’t worked? How did you know?
- c. How do people find out about your organization? By word of mouth? Your local paper? An event poster? Your newsletter? Another organization directed them to you?

### 2. Communication Skills and Training

- a. What kind of in-house communication skills does your organization possess? What skills need to be outsourced at a cost? For example, consider: writing; graphic design; translation (eg. into French or Cantonese); photography; website maintenance.
- b. What kind of public speaking skills do your spokespeople have?
- c. What kind of on-camera media training do your key spokespeople have? (Even the most high-profile speakers in the corporate sector regularly receive on-camera training to hone their skills and update their key messages. Do yours?)
- f. Do you have staff who understand communications and have time to dedicate to communication-related activities?

### 3. Systems and Protocols:

- a. What kind of established systems and procedures has your organization developed, and trained its front-line team members in, regarding:
  - i. Incoming media calls
  - ii. Incoming call or visits from key stakeholders, such as funders or government officials?

- iii. Communications decision-making approvals and processes?

#### 4. Outreach systems

- a. Do you have a website?
  - i. Does it have a media room?
  - ii. How many visitors do you receive in an average month?
  - iii. Do you know who is visiting the site, what attracts and holds them, and whether they come back?
  - iv. Is your site linked to others?
  - v. Do you have links on yours? What criteria do you use for deciding?
  - vi. How easy is it to update your website?
- b. Do you have a regular on-line or hard copy newsletter?
  - i. What does the newsletter accomplish?
  - ii. What does it cost?
  - iii. How are you measuring success of the newsletter?
  - iv. Have you conducted readership surveys?

#### 5. Infrastructure

- a. How extensive is your database?
  - i. Are you able to track media calls and relationships?
  - ii. Funder relationships?
  - iii. Member or constituency information?
- b. How much information do you track on members or constituents?
  - i. Do you have basic demographic information about your constituents, including their contact names, addresses, phone and fax numbers and email addresses?
  - ii. Do you know how they prefer to be contacted?
  - iii. Do you have a sense of their attitudes toward your issues, or their core values, either as individuals or in aggregate? (Note that Information tracking is limited under Canada's new privacy legislation.)
- c. What kind of photographs does your organization have?
  - i. Do you have a regularly updated bank of high-contrast photographs, with permission to use them, that tell the story of your work?
  - ii. Do you have volunteers or other means of gathering such images?
- d. Do you have easily accessible identity materials, such as a logo and tagline, for use in all your communication materials?
- e. Do you have a style guide that sets out the fonts, colours, placement and general layout so that your communication materials are consistent and readily identifiable?

## Situation Analysis: External Environment

It is important to be aware of the external threats and opportunities that potentially affect your organization, including those groups or individuals who may be opposed to, or supportive of, either the work you do or to the way in which you do it. It is also important to be aware of the communication environment in which you will be delivering your messages. Undertaking the work required to understand your organization's external environment will provide you with a snapshot of your current positioning within the local and broad communications environment. This information will help you identify threats and opportunities that may impact the effectiveness of your communication efforts.

Many of these pieces of information can be gathered by an individual in advance of any meeting or broader discussion you may lead with staff or volunteers. For example, you could prepare a kit filled with relevant press clippings, facts about key decision-makers or funders, and summaries of any public opinion research that might exist of relevance to your organization or issue. These pieces of information are critical in ensuring that the audiences chosen and strategies employed in your plan make the most sense for your organization. Make sure that the most strategic and knowledgeable stakeholders in your organization have added their thoughts to this analysis, and that it is available and summarized before embarking on the audience and strategy sections of the communication planning process.

Here are some more specific thoughts and questions on various elements of the external environment in communications planning:

### Public landscape

Consider the ways in which your organization and issue is positioned and understood by the public. Public opinion research is absolutely invaluable for bolstering (or sometimes contradicting!) your own "best guesses." It is well worth searching for any public opinion research that has already been conducted on your issue area or organization.

In most cases, publicly-released polls provide only a quick snapshot of public attitudes on various issues. These are the kinds of polls most of us are more familiar with, where questions and responses are released to the media as a means of generating quick stories or media hits. The questions for these kinds of polls may be leading, and of limited use for really understanding your audiences, potentially resonant messages or strategies. Still, even a little information can go a long way.

Check with other similar organizations to see if they know of relevant opinion research. If appropriate and relevant, check with philanthropic foundations that focus on your issue areas, as they are often aware of both public and quiet strategy opinion research. Search the internet for media stories on publicly-released polls; check with major polling firms as well.

Look for any information that can help develop a profile of supportive audiences and "persuadable" audiences; you can use this information later in your planning process.

Messages and language are rarely tested on publicly-available polls, but just in case, do look for any information that may indicate framing or test arguments. Again, this information can be used later in the process.

Finally, consider whether more research is needed to better understand attitudes and public opinion towards your issue or organization.

### **Media Environment**

Since “earned” media (as opposed to paid advertising) is often such a critical communications vehicle for the not-for-profit sector, a clear understanding of the media landscape in which you will be operating is critically important.

Ask yourself: What are the challenges and opportunities with the media on this issue, or with respect to your organization?

If your organization has a reputation among the local media for failing to return calls promptly or for sending out news releases indiscriminately, then you will have to work hard to build relationships with reporters.

Other more specific questions might include:

- a. To what extent has your organization or issue been covered in the media in the past?
- b. How has the media positioned this issue/your group in the past (or: how have you positioned yourselves)?
- c. What has worked in your past media relations efforts, and why?
- d. What has not worked as well as you hoped? Do you know why?
- e. Which reporters are most informed about this issue?
- f. Are there any reporters that tend to misconstrue stories about your work?
- g. Has the issue/your group already been covered extensively?
- h. What else is hot in the news right now, or about to be hot, to which you could potentially piggyback your messages?

### **Policy Environment**

In IMPACS’ experience, one of the greatest challenges for many groups seeking to advance policy objectives is having a clear sense of the “power map.” For organizations working on a policy change, it is usually difficult to identify target audiences without a clear sense of what the mechanisms of potential policy changes might be – and specific knowledge about the individuals who can trigger those mechanisms. In other words, who has the power to implement the change you seek? What do you know about their needs and motivations, their influencers, demands they face from their constituents and colleagues? And what is it that you want them to do, exactly?

## Allies and Opponents

Avoid making “shopping lists” of allies or competitors. The most important consideration is their “communications footprint” – the extent to which they have the capacity and positioning to deliver messages to the same audiences you are trying to reach.

- a. Who are your allies? Who may be allies?
- b. What resources do they have that could be brought to bear on this issue?
- c. Who are your opponents, if any?
- d. What are their messages likely to be?
- e. What kind of resources or outreach are they likely to bring to bear on this issue?

## Other Questions to consider

- 1. Current local/national perception of your organization, your program and/or the issues your organization addresses**
  - a. How does your community see your not-for-profit organization?
    - i) Are you widely seen as a “grassroots” organization or as a well-funded advocacy group?
    - ii) As a statesmanlike or “think-tank” organization?
    - iii) As credible or questionable?
    - iv) As radical or mainstream?
    - v) As left-wing, right-wing or not political at all?
- 2. History of media stories on your organization or your work**
  - a. How well-exposed is your organization or issue?
  - b. How has it been positioned within the media to date?
- 3. Penetration of your issue**
  - a. Is your issue on the public’s “radar screen” or would most people consider it to be a “new” topic of discussion?
  - b. Has your issue generated local debate or questions from media?
- 4. Allies**
  - a. Who publicly supports your organization’s position? Pay special attention to those individuals or groups that have a significant “communications footprint” – that is, that are heard, watched and listened to by the audiences you care about.
  - b. What are they saying about your organization? About your issue?
- 5. Opponents**
  - a. Does any individual or organization oppose your work?
  - b. What are their messages? What are they saying?
  - c. Whom are they saying it to?
  - d. What effect are they having on your positioning?
  - e. What are *their* strengths and weaknesses?

## Facilitator's Briefing Guide:

### Situation Analysis: External or Public Environment

#### Objectives:

- To collect the information that will allow you to realistically assess the external opportunities and threats that may or will impact your organization's ability to achieve your organizational goals.

#### Activities:

- Focus group (see page 75, *How to Facilitate a Focus Group*).

#### Props/ Materials:

- Flip chart, markers and tape
- Video recorder or tape recorder
- Laptop computer for note-taker
- Lunch or refreshments (as appropriate)

#### Who to invite:

- Individuals who have a good sense of local priorities and interests
- Individuals who understand the provincial policies that may impact legislation on your issue
- People who have some power or authority in your community and whom you hope to engage in your work
- At least two board members who have good community connections
- Optimal number of participants: 6 to 8

## Sample agenda for a one-and-a-half hour focus group

### Situation Analysis: External or Public Environment

Timing (minutes)	Activity	Facilitator's Tip
5	Welcome	Introduce yourself and your meeting note-taker if you have one. If you plan to tape or video record the session, ask the participants' permission.
10-15	Introductions	Ask each participant to state their name and what their role in the community is. Allow 1-2 minutes per person.
5	Overview of the meeting's goals and agenda	Tell the participants what you hope to achieve during the meeting and how you plan to use the information that is shared. Review the agenda and ask for comments.
2	Review of ground rules	This simple list should suffice: <ol style="list-style-type: none"> <li>1. Keep focused</li> <li>2. Maintain momentum</li> <li>3. Get closure on questions</li> </ol>
60	Questions and answers – the focus group time	Ask the group a question (see pages xx for suggested questions). Allow a few minutes for each person to consider and write down their answers. Then, facilitate a discussion around the answers to the question.  After each question is answered, carefully reflect back a summary of what you heard (you may ask that the note-taker do this).  Ask the next question and follow the same process.  <b>Ensure equal participation.</b> If one or two people are dominating the meeting, then call on others. Consider using a round-table approach: going in one direction around the table and giving each person a minute to answer the question. If the domination persists, note it to the group and ask for ideas about how the participation can be increased.
2	Wrap-up	Tell participants that you will take away this information, put it into a form that can be shared, considered and further discussed.
3	Thank-you's	Thank each person for participating in the meeting. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses. If they are interested in receiving a written report of the meeting, provide this option to them.

## AUDIENCES

When we think of talking to potential donors, members, or even policy-makers, most of us tend to think about just that – talking *to* them. But one could argue that most of our work as communicators really lies in *listening* to our audiences – learning more about what makes *them* tick, where their values are, what matters to them. In fact, Andy Goodman, a campaign consultant based in California, suggests that instead of describing “talking points” in our speeches and campaigns, we should instead think about “connecting points” – starting with the places our audiences are at, and only then linking back to our issues. Because in most cases, the audience is not *us* – we should set aside all of our preconceived notions about what messages and delivery approaches will work best for *them*.

### Identifying Your Audiences

So, who is the right audience? Identifying your audience is a critical step in communications planning. In some cases, when you’ve stepped back to review both your organization’s goals and objectives, and key features of the communication landscape described above, you may discover that there are important new audiences your organization should be trying to reach and engage.

Again, one way to answer this is to consider who – exactly – has the power to deliver the change you seek, whether it is raising funds for new equipment, implementing a government policy change, or changing individual lifestyle behaviours. It is also very important to be as specific as possible when developing your list of target audiences. Remember, there is no such thing as a “general” public in communication initiatives. Even if you decide that you need to reach a majority of the people who live in your community with messages about your work, you will not be speaking to a general public, but to many specific publics.

### Profiling your Audiences

Next, you need to understand where your issue or organization fits in *their* landscape. Where is your issue, or organization, on their “radar screen?” Is their engagement high, moderate or low? Are they supportive? Opposed or indifferent? Persuadable?

Consider this: if you were to take a cross-section of ten Canadians, you might find that their views on a well-known issue vary. If you were to conduct a public opinion poll on the issue, you might find that the results show that their attitudes break down something like this: Two out of ten may be completely **opposed** to your group or your approach to a particular issue. Another three might be too distracted, busy or simply **apathetic** to involve themselves at all. Another two might be completely **supportive** of your perspective. Those supporters are critical – they include your volunteers, members, and other constituents, and are the most likely to publicly support your issue or implement the calls to action that you seek. Finally, another three might be **persuadable** – that is, they

have not made a decision about where they stand, but they could be persuaded to support your position.

For any communication initiative seeking to reach out to new audiences or broaden its constituencies, this last category of audiences is absolutely critical, and may be the audience to which you allocate the most of your communication resources.

### Profiling Audiences: The “Typical Ten”



Next, you need to understand what might motivate each target audience to act. What are their fundamental values? What are their attitudes toward the issue your organization is addressing? Does your audience get motivated by guilt? Rebelling against authority? Being cool? Protecting their children? Protecting their jobs? Are they a group of businesses seeking favourable market positioning? A political leader seeking votes in an upcoming by-election? Senior citizens with free time seeking greater connection with others in their community? Young people seeking the approval of their peers, or perhaps looking for job skills? Often, our assumptions about audience attitudes and values are simply wrong. Remember, the audience is not us – and the values that compel us to work with passion and commitment may be quite different from theirs.

Each public, or audience, can be distinguished by the values that the majority of it’s members share. Just consider how challenging it would be to develop one communication vehicle that would equally engage a group of teenage boys just as well as it would the mayor of your town. Would teens really respond to a formal letter written in bureaucrat-speak? Would the mayor really respond to a message delivered rap-style by a young man in enormous baggy trousers? Not likely!

The table in Appendix E may be helpful in pooling your organization’s “brain trust” and developing a profile on priority audiences and a clear sense of what you want them to do, once you have identified them. The more you can complete the table using opinion research data, rather than your own “best guesses,” the more accurate your analysis will be. And the more effective you will be at reaching out to these audiences.

## Questions to Consider

1. Who are your *key* audiences — those groups of people who have the power to help you achieve your organizational goals and objectives? It is likely that different goals and objectives will require different audiences to help you achieve them. Some examples of typical not-for-profit audiences:
  - a. Clients, one time
  - b. Clients, ongoing
  - c. Community leaders, business (such as bank manager, Chamber of Commerce president)
  - d. Community leaders, religious
  - e. Donors, major (over a set amount, such as \$1,000)
  - f. Donors, monthly
  - g. Donors, multiple gifts
  - h. Donors, one time gift
  - i. Federal or provincial government bureaucrats (staff)
  - j. Federal or provincial government elected officials (Members of Parliament or the Legislative Assembly)
  - k. Municipal government bureaucrats (staff)
  - l. Municipal government elected officials (Mayor, Councilors and Trustees)
  - m. Other not-for-profit organizations
  - n. Potential donors, business
  - o. Potential donors, individuals
  - p. Potential donors, organizations and foundations
  - q. Potential volunteers
  - r. Project and program partners
  - s. Voters
2. Can you identify at least *one individual person* who fits into each of the audience categories you have identified as being important to your success? List as many specific people as you can for each audience.
3. Define some of the values that you believe motivate these individuals to act. For example, current opinion research suggests that a key value most youth share is based on developing job skills. An audience of mothers shares values about the health and safety of their children. Business people tend to value economic factors over emotion-based ones.
4. At what stage of engagement are each of the individuals you have identified?
  - a. *No engagement*: doesn't even know the name of your organization
  - b. *Low engagement*: knows who you are but has never interacted with your organization
  - c. *Moderate engagement*: may have come to an event, donated to, sponsored or volunteered with your organization in the past, but is not currently involved in any active way
  - d. *High engagement*: is actively engaged as a volunteer, donor or other supporter

5. How can you engage each of the individuals you have named? What specific action can you ask each person to do, *based on their current level of engagement*, to help you achieve your goal? For instance, you would not ask an individual with no engagement to donate \$1,000, nor would you invite an individual with high engagement to an information session about your organization.
6. What's in it for them? What benefits can you offer in the immediate short-term, or possibly over the longer-term, that might make it worth their while to expend precious time and energy focusing on your issue?
7. What are their key sources of information? Do they regularly use the internet for information-sharing? Do they attend face-to-face meetings? Read mainstream news media? Listen to opinion leaders in their communities?

## MESSAGES

What is the “right message?” Developing strong messages that really resonate with your target audience is definitely an art more than a science. Ideally, a message is based around a single theme.

Messages can also be thought of as short, simple statements repeated in all communications – web pages, brochures, speeches, news releases, and so on. In either case, here just are a few guidelines to consider. Generally speaking, effective messages are:

- Clear and simple
- Brief
- Believable
- Compelling
- Delivered by the right messenger

### **Clear and Simple**

This is harder than it sounds. Many of us working in the not-for-profit sector (or in policy and academia, for that matter) use acronyms, phrases or even specific words that may serve as a form of verbal shorthand to refer to complex processes or issues. Such jargon may be second-nature to those who are intimately familiar with a particular issue or area of study, but may as well be a foreign language to people on the outside. Generally, clear and simple means communicating in plain language – a Grade 7 reading level is commonly used as a benchmark for testing the clarity of language in messages.

While messages are most effective when they are based on language that is familiar to the target audience, some groups will deliberately, but judiciously, introduce new terms as part of a longer-term communication strategy. The public’s understanding of various phrases and concepts evolves over time, and it is perfectly legitimate to “push the envelope” with language. But when we do, a bit of an explanation or translation into plain English will almost always be necessary — usually for several years. As a general rule, it usually takes a *minimum of two years* of consistent communication around a new concept before that concept will be widely recognized and understood.

### **Brief**

With messages, as with so many other aspects of effective communications, the rule is: *less is more*. A message is generally not a paragraph; it may not even be a whole sentence. The shorter a message is, the easier it is for both the speaker and audience to remember. Notice that with large corporations, such as Coke, Nike, and others, the messages conveyed through their ad campaigns are increasingly brief. In Nike ads, for example, there are often no words at all – just a simple photograph, and the Nike logo at the bottom. The message is communicated through visuals that reflect the values of their target audience.

**Believable**

This point may seem obvious, but it is worth emphasizing. Messages are not effective if they are not believable. For example, if a corporation known for working in countries with abysmal human rights records starts conveying messages about being a good corporate citizen, concerned with human rights and social justice issues, their communication efforts are likely to backfire. Instead, an effective message might initially be: “we recognize our mistakes, and we’re changing.” Of course, such a message would have to be backed up with substantive initiatives in order to be believed. Then, over time, the corporation may be able to effectively deliver messages about being a good corporate citizen – and be believable.

It is also important that the speaker herself believes the messages she is delivering. When we believe in our messages, we convey them with conviction and passion to which our target audiences are more likely to respond. Which brings us to the next point:

**Compelling**

Effective messages usually make use of symbols that speak to the core values of the target audience. This is an aspect of messages we often struggle with. We are used to avoiding emotional language or concepts and of qualifying everything we say with words like “may” and “sometimes.” A good message is emphatic. It speaks to core values such as “fairness,” “individual freedom” (in some countries), “collective responsibility” (in others), “accountability” or “safeguarding our children’s future.”

A good message also evokes an emotional response. When we consider the great speech-makers of our time – Mahatma Ghandi, Noam Chomsky, Mary Robinson, David Suzuki, Nelson Mandela, Helen Caldicott – we note a similarity in their delivery: they are not afraid to evoke the passions of their audiences. They understand the core values of their audiences, even as they speak from their own hearts – and we remember what they say.

**Delivered by the Right Messenger**

This final point is a critical one. The fact is, *who* delivers an effective message is as important as the message itself. In other words, *messengers are as important as messages*. This is a key challenge for many not-for-profit organizations: the person with the greatest prestige or seniority is routinely assigned the role of spokesperson for the group, regardless of their skill, aptitude or training. (On-camera media training will immensely improve the abilities of any spokesperson. It also provides the opportunity to take a hard look at whom is *really* the most effective public representative for your group and its issues.)

When selecting key spokespeople, consider who can best reflect the kind of tone and positioning your group seeks with the broader community, or with specific target audiences. For example, women tend to respond better to messages on health care when they are delivered by mature female messengers. Men – and usually women – respond best to authoritative male messengers when they are delivering messages about the economy. Research on the “Nexus Generation” shows that youth tend to respond to other youth messengers who are just a bit older than themselves.

<b>Key Audiences</b>	<b>Individual we will approach</b>	<b>Level of engagement</b>	<b>Call to action/objective served</b>	<b>What's in it for them?</b>

## STRATEGIES AND TACTICS

### What is a Strategy?

This is the most creative part of the communication plan – where the “rubber hits the road.” Once you’ve defined success clearly, laid the groundwork with a thorough situation analysis, and developed a clear sense of who your specific audiences are and what they value, you are ready to develop strategies for delivering your messages.

Basically, strategies are the broad, creative ways you are going to achieve an objective. Tactics are the specific activities that help you execute your strategy. For example:

**Org Objective:** Increase our major gift fundraising by 10% in the next year.

**Com Objective:** Raise our organization’s profile and positioning in the local media.

**Benchmark:** to get three favourable stories about the organization into the local paper in the next six months, targeting audiences that are likely to include the kinds of candidates we seek (higher income opinion and business leaders).

**Strategy:** Profile one of our own champions. Specifically, profile one of our founding board members, focusing on one with a particularly deep understanding and passion for our work, expertise on the issue, and great communication skills – and credibility as an opinion leader herself.

**Tactic:** Feature article: Draft a “pitch letter” to send to the reporter (or editor, in some outlets) that our research indicates would be most interested in the story. Include information about other leading or interesting community figures that could provide testimonials about our director’s passion and success in doing this work. Gather interesting photos (eg. on location while working on our issue) and make these available. Set up a meeting with the reporter to deliver this package and “sell” the story.

**Tactic:** Speech: Have our profiled Board member speak at a morning Chamber of Commerce meeting about the challenges and opportunities faced by the community with respect to the issues addressed by our organization, focusing on a current news hook, and pitch reporters to cover the story.

**Tactic:** Op-ed: Showcase our organization’s expertise, as well as the urgency of the issue it addresses, by ghost-writing an opinion article (or “op-ed”) for our profiled Board member about the issue. (This would help in reaching our community’s opinion leaders, who tend to read op-eds).

Of course, this is just one example of several strategies that could be used to generate media attention that would help you achieve your organizational and communications objectives. It is also likely that you would have several other objectives for meeting your goal. They could include more direct forms of audience outreach, such as face-to-face meetings, or special events. And again, each objective may be fulfilled through a variety of strategies or approaches, which could, in turn, be executed through a range of tactics.

## What's the Difference Between Strategies and Tactics?

As anyone planning a communications effort knows, it is often easy to confuse strategies and tactics. But look to the sidebar below – in most cases, these are tactics. One communications initiative or campaign may involve dozens of tactics. And the same tactics are employed in all sorts of campaigns. But they may be used in different ways, and to different ends.

### A Few Sample Tactics:

- Action alerts
- Briefing kits
- Brochures
- Bumper stickers
- Coffee-table books
- Columns in the newspaper
- Direct mail
- Display tables
- Door-to-door canvassing
- E-cards
- Educational or briefing videos
- E-newsletters
- Face-to-face presentations
- Feature articles
- Leafletting
- Letters to the editor
- News conference
- Newsletter articles
- Newsletters
- On-line chat-rooms
- On-line faxing
- Op-eds
- Paid advertising (TV, radio, outdoor, print, web banner)
- Petitions
- Phoning/telemarketing
- Popular theatre
- Postcards
- Public service announcements (PSAs)
- Rallies, demonstrations
- Sign-on letters
- Signs
- Slide-shows
- Staged events
- Talk radio/TV call-in shows

## Creating Your Strategy

There's no magic process for developing effective communication strategies. The process really is inherently creative, involving a combination of "blue-sky thinking," and pragmatic decision-making based on your organization's ability to deliver. That is why the groundwork laid out in the previous sections is so important – it sets the stage for understanding your organization's assets, limits and positioning, and juxtaposing these against your audience's profile, needs and values. Developing a great strategy depends on the answers to a few questions:

- a) What are your organization's communications' assets (resources, messengers, skills, positioning, relationships)?
- a) How thorough and accurate is your understanding of the communication landscape into which you will be delivering your messages? (media, policy, competitors/opponents, allies etc)?
- b) How well do you understand your audiences? Do you really understand *their* values, attitudes, language, needs?
- c) How creative can you and your team be?

## Strategies Used by Other Not-For-Profits

Sometimes it helps to look at the many kinds of strategies other not-for-profit groups have used to achieve their objectives. There are as many different strategic approaches as there are creative solutions to any communication challenge. Here are just a few. Most of these strategies are broad enough to define entire campaigns.

### Inside Messengers

Cultivate and work with messengers that share your vision and have unique or special access to your key audiences or decision-makers. These kinds of strategies take place all the time in politics and fundraising. Often, these initiatives do not involve public communications at all. Instead, they are quiet and highly targeted.

### Gatekeeper

A gatekeeper is a person who can provide access to dozens or hundreds of other people within your target audience profiles. Doctors, retail chain leaders, bank managers and teachers are just a few examples of potential gatekeepers for some issues.

### Celebrity Endorsement

In a similar vein, celebrity endorsement is another strategy that most of us have seen used successfully. Usually, these strategies focus on earned media, though some also include paid advertising as well. There are so many examples of celebrities working with not-for-profit groups to help spread the word and raise support for a range of issues.

## Markets

Markets strategies are sometimes used by groups as an efficient way of changing corporate practices, as opposed to lobbying for government policy change or changes in individual consumer practices. Retailers or other major buyers are typically the key audiences for markets campaigns. The call to action is to either avoid certain kinds of products, or to purchase others.

## Report/Content Releases

Many organizations are familiar with the strategy of developing and releasing well-researched, credible studies on the impacts, barriers and solutions to particular social, environmental or health issues. Some of the tactics that best support this kind of story to generate more than a few stories for 24 hours include: ensuring that at least one of the report authors is a compelling speaker; that the authors are credible experts on the issue; and that photos or images are gathered through the course of the research to help tell the story.

Since media relations are always risky, as anything can happen on the day of your release, and the media is just one medium for reaching your ultimate key audiences, ideally, the information is also released through the internet, through face-to-face briefings with key audiences, and so on.

## Facilitator's Briefing Guide

### Strategies and Tactics

#### Objectives:

- To identify appropriate strategies and tactics to achieve your organization's goals and objectives.

#### Activities:

- Creative brainstorm (see page xx, *How to Facilitate a Creative Brainstorm*)

#### Props/ Materials:

- Flip chart, markers and tape
- Handouts that indicate the organizational goal(s) and communication objective(s) you are trying to develop and strategies and tactics to address them
- A list of the audiences you hope to engage and how you expect individuals from each of these audiences will support you

#### Who to invite:

- Interested staff members
- Interested board members
- Creative allies
- People who don't work in the not-for-profit sector who could provide fresh ideas from the environment they live and work in
- Optimal number of participants: 6-8

### Questions to get the Group Thinking Creatively

As with other lists of questions in this handbook, these are intended to provide you with an idea of the direction you can take your group in. Adapt these questions to suit your organization's specific target audiences, your communication objectives and your organizational goals. The starting point for developing appropriate brainstorming questions for your organization must be based on the work you have completed in your communication plan to date, otherwise, you will come up with lots of great strategies and tactics that will not move you any closer to achieving your organizational goals — which is, of course, your goal!

1. Our organization is trying to become the community leader in all things related to our specific field. How can we achieve this?
2. We need a new way to engage youth in our organization. What will make youth notice us?
3. We have been in this community for seven years but we are still a "best kept secret." What do we need to do to get people talking about us?

4. The government is cutting funding to not-for-profit organization across the province. How can we show them that we are a valuable investment?
5. Our annual fundraising dinner has become stale. What new community event can we try out this year?
6. The editor of the local paper is supportive of our organization. What kind of media coverage can we plan for the next six months to take full advantage of his support?
7. The editor of the local paper is *not* supportive of our organization. How can we get profile in the community without his support?
8. We have seniors banging at our door for programming that will include them. Any ideas?
9. Last year our fundraising raffle did little to raise our profile outside of the “usual suspects.” What could we do differently this year with our raffle?
10. Our board and staff have agreed that our five-year goal is to change the world. How would you go about doing that? Where would you start?

## Sample Agenda for a Three Hour Creative Brainstorm

### Strategies and Tactics

Timing (minutes)	Activity	Facilitator's Tip
5	Welcome and introductions	Introduce yourself and, if not all participants know each other, ask each person to state their name and affiliation with your organization.
5	Overview of the meeting's goals and agenda review	Tell the participants what you hope to achieve during the meeting and how you plan to use the information that is shared. Review the agenda and ask if anyone has comments.
2	Review of ground rules	Keep it simple for this group: <ol style="list-style-type: none"> <li>1. No analysis or criticism of other's ideas allowed (no "black hat" thinking)</li> <li>2. There are no wrong ideas, anything goes</li> <li>3. Crazy ideas are okay, even encouraged</li> </ol>
60-90	Creative brainstorm	The timing of your brainstorm is quite important. If you are doing this during work hours, ensure it is not done in the period right after lunch when people are sleepy. Participants must be alert and energized for the creative aspect of the brainstorm to work.  Ask a very open-ended question to get people thinking. See page <b>xx</b> for some suggestions.
15	Selecting the ideas that should be further developed	Use the "dotmocracy" technique described on page <b>xx</b> , <i>How to Facilitate a Creative Brainstorm</i>
60	Developing the top five ideas	Take up to five of the best ideas, those that received the most votes, and discuss the specifics of how each idea could be handled.
2	Wrap-up	Tell participants that you will take away this information, put it into a form that can be shared, considered and further discussed.
3	Thank-you's	Thank each person for participating in the brainstorm. Tell them that their input was very valuable and that you will stay in touch with them as the development of the communication plan progresses.

## Prioritizing Strategies and Tactics

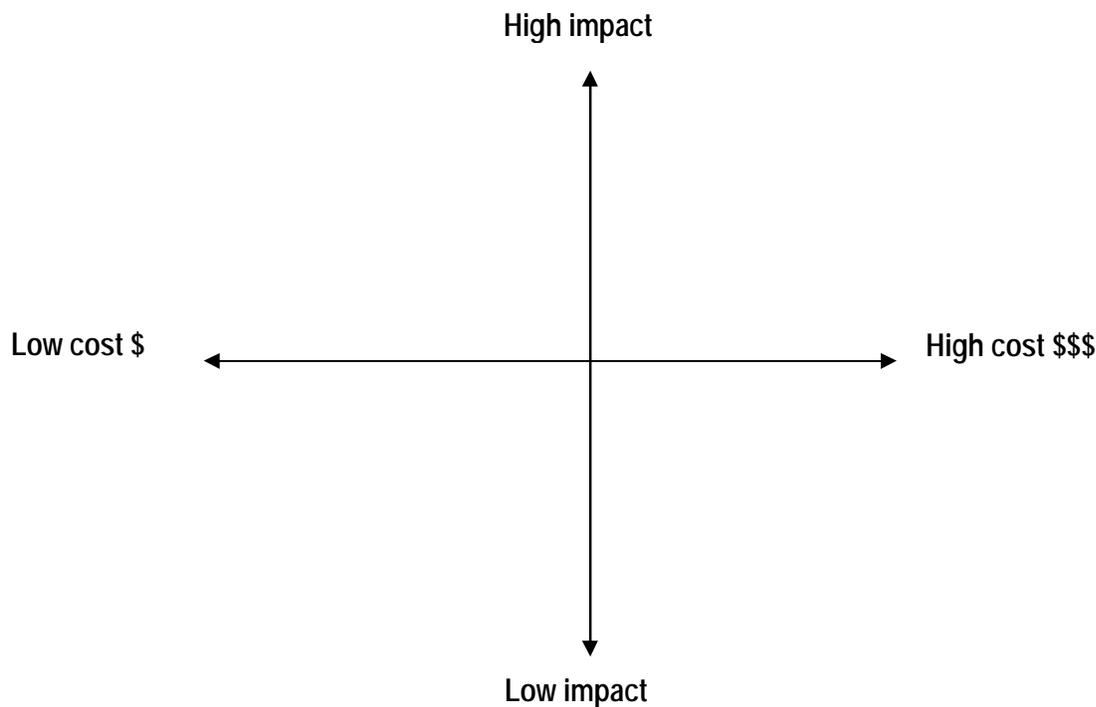
There are two basic criteria for selecting the most effective tactics out of a sea of dozens, or for that matter, selecting one broad strategic approach from many possible paths. In setting priorities, you need to consider:

**Cost** – what kind of financial and human resources will be used? Do you have the skills in-house or will you require additional energy and time to get staff up-to-speed? What are the hard costs associated with the tactic?

**Impact** – what kind of impact do you envision this tactic having? Is there any way to test your assumption, for instance by consulting with friendly representatives of your target audience?

IMPACS often uses a simple grid to help map out the answers to these questions:

### Mapping Strategic and Tactical Priorities Grid



## Evaluation of Ideas for Strategies and Tactics

Evaluation is simply a way for you to measure success. It is a very important aspect of your communication plan. It occurs at many levels and many times. Evaluating your plan and the assumptions on which it is based allows you to get outside of the realm of our own, highly subjective (and sometimes inaccurate) self-assessments as an organization, and to determine what's working (or not working) in the wider world.

We have included evaluation here, following the identification of potential strategies and tactics, as you are now at the point where you will want to proactively evaluate something your planning process has produced. Of course, we also advise including evaluation at different stages following the implementation of your plan, to ensure you are achieving the results you anticipated:

- Evaluations of your target audiences will help you determine which groups of people or individuals you are having the greatest success engaging in your organization, so that you can refocus energy where it is generating the most success.
- Evaluations of your messages to specific audiences will allow you to judge whether the words and images you are using to communicate with different groups of people are having the desired effect.
- Evaluations of your strategies and tactics will likewise provide you with feedback on how well the activities and projects you have undertaken are working.

This is another task for the communication plan facilitator. Take a few days to consider the ideas you came up with during your creative brainstorm of strategies and tactics. It's funny how a profile-raising event that includes jailing a city counselor can seem like a great idea on a festive Saturday night, but doesn't have the same appeal in the light of a Monday morning at the office... "what *were* we thinking?!"

As with the creative brainstorm that spawned your strategies and tactics, evaluating your ideas can be done in a variety of ways. For many people, this task will be handled in large part subconsciously! We offer one simple suggestion: shortly following your brainstorm, take a couple of hours to contact people who weren't part of the party and pitch your best ideas to them. If you have come up with ideas that will be targeted to specific audiences (which should be the case), then call people who fit the demographics of the group you hope to reach with each strategy and tactic. There's little point in asking a 65 year-old artisan her opinion about how well an interactive classroom play will engage 10-year olds, and even less point in asking a group of 10-year olds if a regular Wednesday tea social would appeal to them.

When doing these interviews, your role is to be as open-minded as possible, to ask how each idea sounds and what challenges you might expect to face if you pursue it. You may find that certain ideas are easier for you to explain than others either

because you like them better or because you have a better understanding of how they could be implemented. As best as you can, don't bias your interviewees by telling them which ideas you think are best. Your goal is to get outside advice that is as free from your influence as possible.

Once you've completed the survey and recorded the respondent's answers, thank the person. Remember that this is just one person's opinion. Call a few more people who you suspect would share a similar audience profile and look at all of their comments together. If you feel confident that you have a strong idea, and your survey respondents generally agree, go with it. If your respondents are unsure, but you still feel the idea has merit, consider calling together a focus group, or creative brainstorm with only members of the specific audience you are trying to engage.

## Facilitator's Briefing Guide

### Evaluation of Ideas for Strategies and Tactics

**Objectives:**

- To determine whether specific strategies and tactics will help your organization achieve the goals and objectives you have set.

**Activities:**

Use the tool that is most appropriate to reach each of the individuals you decide to interview. Either:

- short telephone interview
- short in-person interview
- short email survey

**Props/ Materials:**

- Written survey to act as a prompt in telephone interviews
- Copies of your survey to distribute by fax and email
- Summary of your organizational goals, communication objectives and the target audiences for each strategy as background information to respondents who ask for more details

**Who to Include:**

- People who did not participate in your creative brainstorm
- People whom you consider to be representative of the audience each of your strategies will target
- People who don't work in the not-for-profit sector who could provide fresh ideas from the environment they live and work in
- Optimal number of respondents: 4 to 6 per strategy idea

## Sample Survey Questions

*Either read or include adapted text in a written survey*

“Our organization has set a number of goals that we would like to achieve over the next <add timeframe>. One of those goals is to <add your goal>. A few days ago we brought together some people to discuss ways we might be able to achieve this goal. I’d like to ask you for your opinion of the ideas we came up with. This should take less than ten minutes. I have five questions I’d like to ask you. Have you got time to right now or can you suggest a time that I can call back?”

“One of the audiences we hope we can engage the support of is <general description of the audience>. Since you are <a member of that audience/know that audience well>, we are very interested in how you would react to the following idea.

“We’re planning to <broad description of communication objectives>. It has been suggested that one way to approach this would be to <details of strategy or tactic>. What do you think?”

Wait for an answer, then draw out more information by asking open-ended questions such as:

“Why do you think that?”

“Do you think that other <description of the audience> would feel the same way as you do?”

“Can you think of another way to get <description of the audience> to <description of goal>?”

## IMPLEMENTATION BUDGET

Mapping out the costs associated with each strategy and tactic (as well as for the initial research you may need to conduct) is a critical stage in communication planning. In IMPACS' experience, many not-for-profit groups have to fundraise in order to implement their communication plans. The good news is, you may be able to use the plan itself, including the budget, as the basis for fundraising proposals. Many organizations we work with use this approach. Once you have collected your financial data you will have all the details and rationale you need to develop a smart, thoughtful and compelling funding proposal; one of the fringe benefits of communication planning.

### Researching Costs

Sometimes, extensive research is needed to accurately estimate the costs of implementing various phases of a communication plan. For example, if your organization has decided to purchase a modest number of advertising spaces in a community newspaper over a six-month period, you will need to approach the newspaper and negotiate a fee for those repeated placements. The initial quotes you receive from the advertising representative at the paper can feed into your budget. This is a good place for senior volunteers to lend their support.

### Including Staff Time

Since funding to support any not-for-profit's core expenses is becoming very hard to raise, the budget you create in support of your communication activities should include an appropriate amount of staff time that will be required to implement each activity. Consider your communication work in the same way you would consider any other project. Include your time!

Some advice in developing your communication budgets:

- If you think it will take five days to complete a specific activity, budget at least seven.
  - Communications work almost always takes more time than you expect or hope it will.
- If you have been told by a designer that she can create a new brochure for you for \$250, budget for \$500.
  - It is very rare that a designer can stay on budget when working with not-for-profit clients, because, unlike their corporate clients, we like to get consensus, which takes time and usually results in more changes than the designer may have expected to have to make.
- Don't forget to include a budget line for meeting expenses.
  - Space rental, providing refreshments, creating a child-care subsidy pool, and other meeting requirements are legitimate project expenses.

## Generic Sample Budget Template

If possible, create this budget in a spreadsheet (such as Excel) so that calculations are done automatically. Create as many “strategy” columns as you have conceived strategies in your planning. You will be able to compare the relative cost of implementing different strategies and make informed decisions about which strategies are going to be worth the staff and financial investment to undertake.

<b>EXPENDITURES</b>	<b>Strategy A</b>	<b>Strategy B</b>
<b>Staff or Contract Positions</b>		
(add as many lines as necessary: include benefits and taxes. Include volunteer time as an expenditure line then balance it as a revenue against your in-kind donations line)		
<b>Facility (rent, utilities, maintenance)</b>		
(base on a percentage of time for project within overall time)		
<b>Supplies, Materials, Printing, Photocopying</b>		
(include letterhead, printer cartridges and other <i>daily use</i> costs)		
<b>Postage/Courier/Telephone/Fax</b>		
(these may be significant enough to warrant their own lines)		
<b>Publicity/advertising</b>		
(concept development, design, copy-writing, production and printing, could all have lines)		
<b>Meeting expenses</b>		
(include participant travel, childcare expenses, facility rental, food, flip chart paper, markers, etc.)		
<b>Staff travel</b>		
(mileage payouts, hotels, food per diems, babysitting costs)		
<b>Honoraria</b>		
(if this is appropriate, plan for the expense in advance)		
<b>Other</b>		
(list by item)		
<b>TOTAL estimated project expenditures</b>	<b>\$</b>	<b>\$</b>

<b>REVENUES</b>	<b>Strategy A</b>	<b>Strategy B</b>
<b>Organization</b> (including in-kind and volunteer time)		
<b>Project partners</b> (including in-kind contributions)		
<b>Government (list by grant)</b>		
Eg. Municipal, provincial, federal		
<b>Other</b>		
Foundation		
Private donations		
Corporate support		
<b>TOTAL anticipated project revenues</b>	<b>\$</b>	<b>\$</b>

## TIMING

One general maxim of communication planning is that it takes two years of consistent messaging for a new issue or idea to really penetrate the minds of public audiences. At IMPACS, we have seen that maxim play out many times in not-for-profit communication initiatives. For smaller audiences, or smaller communities, the length of time involved may be shorter. But the implications for all of us in the not-for-profit sector is that we may need to plan to deliver our messages many, many times over the course of two years or more, in order to reach our target audiences. With that in mind, this stage of the communications planning process may lead to revisions in strategies or tactics developed earlier in the process.

Then comes the practical work of writing down all those tactics and related communication activities, and assigning staff or volunteers to lead each piece of the work.

Before doing so, it is extremely helpful to map out specific communication opportunities and potential barriers. In fact, you may have already identified many of these in the situation analysis phase of your work. Basically, once you have all of your audiences, messages, strategies and tactics figured out, somebody has to develop a calendar to determine how realistic your plans really are.

In the Timing section of your plan, write down all of the potentially relevant regional, provincial and national dates and community events that you may want to consider either hooking onto or avoiding conflict with. For instance, each year the federal government announces their new fiscal budget. Some organizations effectively hook their events, stories and reports to the media flurry of activity around this event, while other organizations' messages get lost among all the budget chatter. You need to determine whether your issue will be one that the budget news will ignore or embrace.

### Example of an Annual Master Calendar

Date	Event	Connect With or Avoid
January 1	Statutory Holiday, New Year's Day	
February 14	Valentine's Day	
February 28	Ash Wednesday	
March 17	St. Patrick's Day	
April 8	Palm Sunday, Passover	
April 13	Statutory Holiday, Good Friday	
April 15	Easter Sunday	
April 16	Statutory Holiday, Easter Monday	
May 21	Statutory Holiday, Victoria Day	
June 17	Father's Day	
July 1	Statutory Holiday, Canada Day	
August 6	Statutory Holiday, BC Day	
September 3	Statutory Holiday, Labour Day	
September	Terry Fox Run	
October 8	Statutory Holiday, Thanksgiving Day	
November 11	Statutory Holiday, Remembrance Day	
December 10	Hanukkah	
December 24	Statutory Holiday, Christmas Eve	
December 25	Statutory Holiday, Christmas Day	
December 26	Boxing Day	

### Example of a Monthly Master Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 STAT HOLIDAY	3	4	5	6	7 THEATRE — OPENING NIGHT
8	9 LITERARY WEEK AT THE LIBRARY	10 LITERARY WEEK AT THE LIBRARY	11 LITERARY WEEK AT THE LIBRARY	12 LITERARY WEEK AT THE LIBRARY	13 LITERARY WEEK AT THE LIBRARY	14 LITERARY WEEK AT THE LIBRARY
15	16 COUNCIL MEETING, CITY HALL	17	18	19	20 EVENING FUNDRAISER AT HIGH SCHOOL	21 CREEK RESTORATION BY ENGO
22	23	24	25	26	27	28 WALK FOR A CURE
29	30 NOT-FOR-PROFIT ORGANIZATION AGM	31				

## TIMELINE

The Timeline is simply another big planning calendar that includes the dates you've decided to perform each of your communication activities, and all of the steps that will lead to the success of your initiatives. You can develop a timeline for each of the specific areas of your communication plan. This is especially helpful if you expect to be undertaking different tactics within your plan concurrently, or if different people will be responsible for different pieces.

IMPACS has created a sample timeline for the development of your communication plan as an outline. We recommend that you, too, start by creating a timeline for the process you will be leading. Once you have completed all of the steps that have led you to this place, it will be time to develop your second timeline: the timeline for all of the activities that your communication plan has identified.

If the process of developing a communication plan is new to you, we recommend that you develop a timeline for what you hope to accomplish in the first three or four weeks. You may find that organizing a meeting in your community takes only the time to draft a short invitation and email it. Or you may find that it takes much longer, having to make each invitation one-to-one with a half-hour conversation with each invitee. Experience will be the best teacher in developing your timeline.

### Questions to Consider

If you are asking a staff person (yourself included) to undertake certain new tasks, (for instance, activities that have been created as per the strategies and tactics section of your communication plan), consider the following:

- How long will it *really* take for that person to get up to speed on the new task? If it is something that he or she has never done before, such as writing press releases, it will likely take several hours to write each one.
- What are you going to remove from that person's list of responsibilities? If you don't actually remove a task that the person currently does, then the communication work will have to be done "off the side of his or her desk," or as overtime. This is a surefire way to guarantee failure of your new plan.
- Don't forget to include the time required by the person who will be managing the person who will be managing the communication initiatives!

If you are asking for support from volunteers, consider the following:

- Have you already identified willing volunteers to handle some of the new work? If not, give yourself several weeks to find the appropriate individuals. It is better to start a project a week or two behind schedule with the right person doing the work, than on-time with the wrong person. It's best, of course, to start on time with the right person — so give yourself that time.

## IMPLEMENT AND EVALUATE THE PLAN!

### Assign a Staff Lead

Ensure that somebody, one person, maintains responsibility for ensuring that your strategic communication plan is implemented. By now you have invested many hours of volunteer and/or staff time in the development of your plan. You have developed some great ideas that should help you achieve your organizational goals. You have included the appropriate people in the process and established staff and board support for the new plan. Don't put the plan on the shelf and go back to business as usual! Use it. Update it. Pull it out when you are writing new funding proposals.

### Updating Your Plan

Although you can call your communication plan “complete,” please remember that a working communication plan is a living document. It should be used as a guide to help you achieve your organizational goals and objectives in the most strategic way. Review your plan at least quarterly, and update it as you develop new contextual information, new understanding of key audiences, refined messages based on experience, and adjusted strategies, tactics and timelines. This document will be key for evaluating success and ensuring lessons learned are captured for the next communications initiative. Your plan should be referred to and used as a tool to keep new ideas on target, always pointing your organization in the direction you set at the beginning of the whole process.

### Evaluating Your Plan

If you developed clear, measurable benchmarks in the first stage of your planning process, then evaluation is relatively easy – in most cases, you may be able to answer questions about your success with simple “yes” and “no” answers. This is why setting benchmarks is so critical. If one major objective of your plan was to raise the profile of your organization among high-income business leaders in your community, and your major strategies for achieving this revolved around earned media, then success is easy to measure: were you successful in placing an op-ed profiling one of your board members? Did local media outlets publish or broadcast at least three stories where your organization was both mentioned (or even profiled) and favourably positioned?

As a living document, your plan should be evaluated on a regular basis to ensure it is providing you with the guidance you require. Recall that a strategic communication plan:

1. identifies and endorses a particular, desired future (your goals);
2. evaluates that future against other possible futures;
3. researches which desired futures would be possible (your internal and external environments);
4. evaluates the available resources;

5. outlines what needs to be done (your objectives);
6. evaluates the consequence of actions and possible actions;
7. decides on a particular course (your strategies);
8. evaluates the effectiveness of that course;
9. communicates that action plan (your tactics);
10. evaluates the impact of your actions.

Before you engage in each of the strategies and tactics in your communication plan, ask yourself and others within your organization to define exactly what success will look like once that activity has been completed. If you don't meet your success target, evaluate why.

- Were your success measures set too high?
- Did you misjudge a particular audience's expected response to your activity?
- Was it simply that the timing was bad?
- Did you achieve a success that is different from the one you defined, but equally valuable to achieving your organizational goals?

# SUPPORT MATERIALS

## APPENDIX A: OUTLINE OF A STRATEGIC COMMUNICATIONS PLAN

### **Executive Summary**

Typically 1-2 pages, outlining key strategy recommendations.

### **Introduction**

- Background of issue
- Background/history to date of organization/coalition/campaign
- Purpose, limitations of this plan

### **Goals and Objectives**

### **Situational Analysis**

Each section would briefly describe, and outline internal strengths, internal weaknesses, external threats, external opportunities

- Political environment
- Public environment (public attitudes, awareness of issue, core values most relevant to issue, demography)
- Media environment (quality and quantity of coverage to date)
- Allies (who; their agendas/motivators; leverage they offer)
- Competitors/Opponents (who; their agendas/motivators; their messages)
- Organizational capacity (ie capacity; resources; positioning on issue; profile)

### **Target Audiences**

Describe who, desired actions, agendas/motivators, potential influencers, and profiles of each if possible (demographics, attitudinal, sources of information etc.)

- Primary (Decision-makers)
- Secondary (influencers/opinion leaders; key publics)

### **Messaging**

Recommended messages will be included.

- Criteria
- Rationale (given target audience profiles and available opinion research)
- Draft topline messages

### **Strategies/Tactics and Benchmarks**

Recommendations for strategies and tactics will be included. Here we would detail tactical options such as further research or delivery mechanisms such as ad placement, media relations, strategic alliances, etc. These tactics and benchmarks may be organized as follows:

- Develop Strategic Alliances:
- Government Relations:
- Public Outreach:
- Media relations:

**Evaluation Mechanisms**

*Examples could include:*

- Benchmark/tracking polls (testing awareness of issues and depth of support as these shift over time, possibly at 6-month intervals, using small sample sizes such as 300n)
- Media monitoring – measuring quantity, quality (framing, length of stories, placement of stories) of both proactive and responsive media activity in Canada
- Membership/volunteer base
- # of active listserv members
- # faxes generated through website to key decision-makers; etc.

**Research needed**

- public opinion research
- political research
- other research

**Workplan and Timelines**

*These may be general or detailed, depending on the client and nature of the project.*

**Budget and Resources Needed**

## APPENDIX B: HOW TO PLAN AND FACILITATE MEETINGS

*Adapted from **Organizing for Social Change**, Second Edition, published by Seven Locks Press, California, 1996. We have not yet received permission to copy this information, so ask that you do not further distribute this section.*

Meetings can make or break your communication planning process. If your meetings are well-prepared, focused on planning for action, and facilitated in an efficient, yet involving and upbeat manner, you will accomplish a great deal. On the other hand, if your meetings are poorly planned, poorly run, and don't focus on planning for action, it will be difficult, if not impossible, to build your communication plan.

Every meeting is important and must be planned with great attention. With solid planning, good facilitation, and strong follow-up, an organization can move forward in ways that win real victories. Meetings play a significant role in achieving your goals and deserve your utmost attention. Make your organization the one with fun, productive meetings.

### Preparation

Well run, effective meetings require solid preparation. The hardest part, and certainly the most time-consuming aspect of a meeting, is the planning. Consider the following:

#### Goals

It is critical that the organizer and key leaders have clear meeting goals in mind. Without them, it is difficult to figure out an agenda and hard to know who should attend. Every meeting should have concrete, realistic and measurable goals of the things you want to accomplish, such as:

- To identify the historical challenges our organization has overcome and successes we have celebrated
- To develop a strategy and timeline for a specific project or tactic
- To identify potential new partners, funders and allies
- To decide where our organization's limited resources would best be focused

#### Site

The choice of a meeting site will affect who comes to the meeting. Criteria for choosing a site include:

- Familiarity — is it a place with which people are comfortable?
- Accessibility — is the site accessible to those you are trying to engage (the disabled, the elderly, people who rely on public transit)?
- Adequate facilities — small meetings need a cozy room while larger meetings need more elaborate facilities.
- Timing — set the meeting at a time that is most convenient for those you want to attend. You may need to call several people and suggest possible options.

- Chairperson — every meeting should have a Chairperson whose main job is to facilitate the meeting (in our model that person would be you!).

### **Agenda**

As the communication plan coordinator/facilitator, it will likely be your responsibility to develop agendas for the meetings you convene. Some tips:

- Assure that participants receive a printed agenda in advance of the meeting
- List topics to be covered and objectives you hope to accomplish
- supply any background documents that would be helpful
- Apply time limits for each discussion item
- Ensure there is time during the meeting to get participants to commit to follow-up work

### **Meeting Roles**

Assign all meeting roles before the actual meeting. There are at least five reasons for people having particular leadership roles in a meeting:

1. The first is that someone is good at something — leading a song, facilitating discussion, welcoming people, etc.
2. The second is that the responsibility is part of someone's role — in a board meeting context, for instance, it is the Treasurer's job to give the financial report.
3. The third reason for assigning a particular role is political — providing a leadership role to a key community leader would be good for your organization.
4. The fourth reason is to develop leaders — to give people who need experience making presentations or leading discussion an opportunity to develop their skills.
5. The fifth reason is to get people to attend — people are more likely to attend if they have an explicit role to play in the meeting.

Typical roles in meetings include:

- Facilitator/Chairperson — this person sees that the meeting moves forward and follows the agenda, unless the agenda is changed by a vote of the group.
- Notetaker — this person takes notes about the meeting, either on flip chart paper for the whole group to see, on a computer so that distribution to the group following the meeting is simplified, or on regular foolscap paper.
- Timekeeper — this person reminds the facilitator about time constraints and has the authority to interrupt participants who dominate the meeting with their opinions or input.
- Presenters — a variety of people can present various ideas, as are appropriate to the objectives of the meeting.
- Tone-setter — this person can open and close the meeting with a centering exercise.
- Greeter — it is nice to have one person dedicated to welcoming people to the meeting. If people attending won't all know each other, this person would also provide name tags.

### **Room Arrangements/Logistics**

Before the meeting, assess the actual room you will use in order to plan the room arrangements and logistical details. Possible items to consider include:

- Chair arrangements — chairs in a circle or around a table encourage discussion. Set up fewer chairs than the number expected, It's better to add chairs than have chairs sitting empty. Have additional chairs readily accessible, perhaps stacked to the side of the room.
- Places to hang flip charts — will tape damage walls? Is an easel available?
- Outlets for audio-visual equipment — will you need an overhead projector? Will you need extension cords?
- Refreshments — do you plan to have refreshments? If so, who will bring them? Can someone else bring cups and plates? Do you need outlets for a coffee pot and kettle? Who will handle clean-up?

Asking people to bring items or to help arrange things for the meeting helps assure their attendance. Assign people to bring coffee, cups, cookies, tablecloths, flowers, etc. Ask another person, or people, to set-up the chairs. Delegating tasks ahead of time may seem like more trouble than it's worth, but it gets people involved in the meeting and your organization. It also helps the meeting run more smoothly, which people appreciate.

### **Turnout**

If you want your meetings to be well-attended, have one person call all the participants one to three days before the meeting to remind them. These calls have an organizing function as well as aiding turnout. Explain the issues that will be discussed at the meeting, why they are important and identify points of controversy.

### **Meeting Facilitation**

Every meeting should be enjoyable, run efficiently, and build organizational morale. Although these characteristics may be difficult to measure, they are terribly important. No one wants to attend meetings that are boring or poorly run. Efficient meetings respect people's time as their most valuable resource. They also build organizational morale by generating a sense of unity and helping people respect and support one another.

Every meeting needs a facilitator, a person who helps the meeting accomplish its goals. In order to be adequately prepared, the Chairperson must know ahead of time that he or she will facilitate the meeting. There's nothing worse than arriving and asking, "Okay, who's chairing this meeting?" If no one has prepared to facilitate, the meeting will probably be poorly run.

Being a good facilitator is both a skill and an art. It is a skill in that people can learn certain techniques and improve their ability with practice. It is an art in that some people have more of a knack for it than others. Facilitating a meeting requires someone to:

- understand the goals of the meeting and the organization;
- keep the group on the agenda and moving forward;

- involve everyone in the meeting, both controlling the domineering people and drawing out the shy ones; and
- make sure that decisions are made democratically.

The Chair must assure that decisions are made, plans are developed, and commitments made, but in a manner that is enjoyable for all concerned. A good Chair is concerned about both the meeting's content and style. By having the other roles suggested, such as notetakers and timekeepers, the Chair has some assistance in moving the agenda along. Here are some guides for meeting facilitation:

### **Start the Meeting Promptly**

Few meetings actually begin on time these days, but you do not want to penalize those who did come on time. For large group meetings, plan to start within ten to fifteen minutes of the official beginning time. For smaller meetings, start exactly on time.

### **Welcome Everyone**

Make a point to welcome everyone who comes to the meeting. Do not, under any circumstances, bemoan the size of the group. Once you are at a meeting, the people there are the people there. Go with what you have.

### **Introduce People**

If just a few people are new, ask them to introduce themselves. If the group as a whole does not know each other well, ask people to answer a question or tell something about themselves that provides useful information for the group or the Chairperson. The kinds of questions you should ask depend upon the kind of meeting it is, the number of people participating, and the overall goals of the meeting. Sample introductory questions include:

- How did you first get involved with our organization?
- What is/has been your role with our organization?
- What attracted you to get involved with our organization?

It is important to make everyone feel welcome and listened to at the beginning of a meeting. Otherwise, participants may feel uncomfortable and unappreciated and won't participate well in later parts of the meeting. The Chair of the meeting may need to introduce him or herself and tell why he or she is speaking or facilitating the meeting. This is especially true when people are unfamiliar with the Chairperson. It never hurts for the Chairperson to explain how long they have been a part of the organization, how important the organization is to them, and what outcomes they hope for from the meeting.

### **Review the Agenda**

Go over what's going to happen in the meeting. Ask the group if the agenda is adequate. While it will be fine 90 percent of the time, someone will suggest an additional item in the other 10 percent. Either the item can be addressed directly in the meeting, or you can explain how and when the issue can be addressed.

### **Explain the Meeting Rules**

Most groups need some basic rules of order for meetings. You can post these on a flip chart so everyone sees them throughout the meeting. Some common rules of order are:

- Do
  - ✓ Personally welcome newcomers
  - ✓ Actively listen to others
  - ✓ Support the facilitator in moving the agenda ahead
  - ✓ Recommend ways to resolve differences
  - ✓ Participate in discussions
  - ✓ Encourage new people to speak and volunteer
  - ✓ Be positive and upbeat throughout the meeting
- Don't
  - ☒ Dominate the discussion
  - ☒ Bring up tangents
  - ☒ Dwell on past problems
  - ☒ Insist that people support your ideas

### **Encourage Participation**

Every meeting should involve the people who come. Encourage leaders and organizers to listen to people. Seek feedback and advice from people and thank them for their input. Don't argue with participants' points of view. Draw out those who seem withdrawn from discussions.

### **Stick to the Agenda**

Groups have a tendency to wander far from the original agenda. When you hear the discussion wandering off, bring it to the group's attention. You can say, "That's an interesting issue, but perhaps we should get back to the original matter of discussion."

### **Avoid Detailed Decision-Making**

Unless it is the goal of the meeting, help the group not to get immersed in details, suggesting instead, "Perhaps a smaller committee could resolve this matter. You don't really want to be involved in this level of detail, do you?"

### **Move to Action**

Meetings should not only provide an opportunity for people to talk, but should also challenge them to plan ways to confront and change the issue on the table. Avoid holding meetings just to "discuss" things or "educate" people. Meetings should plan effective actions to build the organization.

### **Seek Commitments**

Getting commitments for future involvement is usually a goal of most meetings. You want leaders to commit to certain tasks, people to volunteer to help on a campaign, or organizations to commit to support your group. Make sure that adequate time is allocated to seeking commitment. For small meetings, write people's names on a

sheet of flip chart paper next to the tasks they agree to undertake. The Chairperson may want to ask each individual directly how they want to help. One golden rule, especially for meetings of less than ten people, is that everyone should leave the meeting with something to do. Don't ever close a meeting by saying that you will get back to people to confirm how they might be involved. Seize the moment. Confirm how people want to get involved at the meeting.

### **Bring Closure to Discussion**

Most groups will discuss items ten times longer than needed, unless the facilitator helps them recognize that they are basically in agreement. Formulate a consensus position, or ask someone in the group to formulate a position that reflects the group's general position, then move forward.

### **Respect Everyone's Rights**

The facilitator is the protector of the weak in meetings. He or she encourages quiet and shy people to speak, and does not allow domineering people to ridicule others' ideas or to embarrass them in any fashion. Try one of these phrases for dealing with domineering people: "We've heard a lot from the men this evening, are there women who have additional comments?" (assuming the domineering person was a man). Or, "We've heard a lot from this side of the room. Are there people with thoughts on the other side of the room?" Or, "Let's hear from someone who hasn't spoken yet."

Sometimes people dominate a discussion because they are really interested in an issue and have lots of ideas. There may be ways to capture their interest without having them continue to dominate the meeting. For example, ask them to serve on a taskforce or committee on that matter.

In other situations, people just talk to hear themselves. If a person regularly participates in your organization's meetings and regularly creates a problem, a key leader should talk with him or her about helping involve new people and drawing others out at meetings.

### **Be Flexible**

Occasionally, issues and concerns arise that are so important, you must alter the agenda to discuss them before returning to the prepared agenda. If necessary, ask for a five-minute break in the meeting to discuss with key leaders how to handle the issue and how to restructure the agenda. Be prepared to recommend an alternate agenda, dropping items if necessary.

### **Summarize the Meeting Results and Follow-Up**

Before closing a meeting, summarize what happened and what follow-up will occur. Review the commitments people made to reinforce them, as well as to remind them how effective the meeting was.

**Thank People**

Take a moment to thank people who prepared things for the meeting, set up the room, brought refreshments, or typed up the agenda. Also, thank everyone for making the meeting a success.

**Close the Meeting on or Before the Ending Time**

Unless a meeting is really exciting, people want it to end on time. And remember, no one minds getting out of a meeting early.

**Follow-Up**

There are two main principles for meeting follow-up: do it, and do it promptly. If meetings are not followed up promptly, much of the work accomplished at the time will be lost. Don't waste people's time by not following up the meeting. There's nothing worse than holding a good planning meeting, but then allowing decisions and plans to fall through the cracks because follow-up was neglected.

Make sure that your notetaker prepares the meeting notes soon after the meeting. Otherwise, he or she will forget what the comments mean, and they will be useless later. Organizers should work with notetakers to assure that these notes are clear and produced in a timely fashion.

Call active members who missed the meeting. Tell them you missed them and update them on the meeting's outcomes. If you are actively seeking new members, call anyone who indicated that he or she would come, and not just active members.

Thank the people who helped make the meeting successful. Send a brief card or note.

Call new people who came to the meeting. Thank them for coming and see about setting up one-on-one meetings with people who look like potential leaders. Be sure to follow-up with people while their interest is still fresh.

Once the minutes are prepared, write relevant reminder notes in your calendar. For example, if someone agreed to research something by March 15, jot down a call to that person on March 7 and inquire about how the research is progressing.

Place a copy of the meeting notes in an organizational notebook or file so that everyone knows where the "institutional memory" is kept.

## Meeting Checklist

- Have you set concrete, realistic goals?
- Is the site familiar, accessible, representative and adequate?
- Are the date and time good for those you want to attend?
- Do you have a Chairperson for the meeting? Has the Chairperson been involved in preparing the agenda or been fully briefed?
- Does the agenda:
  - Accomplish the goals
  - Encourage commitment and involvement
  - Provide visible leadership roles
- Do you need:
  - Printed agenda
  - Background materials
- Have you asked people to serve as the:
  - Chairperson/facilitator — who? \_\_\_\_\_
  - Notetaker — who? \_\_\_\_\_
  - Timekeeper — who? \_\_\_\_\_
  - Presenters — who? \_\_\_\_\_
  - Tone-setter (open and close meeting) — who? \_\_\_\_\_
  - Greeter (welcome people) — who? \_\_\_\_\_
  - Refreshments, serve/prepare — who? \_\_\_\_\_
- Have you considered the following logistical matters:
  - Chair arrangements
  - Flip chart paper, markers and tape
  - Audio visual support, extension cords and power outlets
  - Refreshments
- Do you have a turnout plan and enough people working on turnout calls? Do you have a system for comparing those who said they'd come to those who actually came?
- Have you arranged for childcare for participants who need that support?
- Do you have transportation for those who need it?

## APPENDIX C: HOW TO FACILITATE A CREATIVE BRAINSTORM

Facilitating an effective creative brainstorm may not be something you have ever done before. The description of the process that follows may feel very loose or out-of-control. The process does allow for out-of-control, or, out-of-the-box thinking which is very important when you are trying to come up with new strategies and tactics to achieve your goals and objectives. Try it!

### Step One

- Put a specific question to the group. Ensure participants stick to the question.
- Record ideas on a flip chart and post these pages on the wall around the room so that all participants can clearly see them.
- Encourage participants to be succinct. Ask people to keep their ideas to about ten words — headlines, not full paragraphs.
- As the facilitator, you must avoid commenting on ideas. Do not allow others to comment on ideas. Ask everyone to suspend judgement about ideas — analysis will come later, in the “do something” step.
- As the facilitator, your role will be to keep the ideas flowing. Keep ideas broad and general. The specifics can be developed in Step Three.
- When recording ideas ensure you use the speakers’ words.
- Wild and crazy is okay. Repetition is okay. Piggybacking on each other’s ideas is great.

### Step Two

Do something with the ideas you have generated. Either:

- *Prioritize the ideas with the group and discuss the most promising*
  - ▲ One effective way to prioritize ideas is to provide each participant with five to ten stickers and have them put their stickers beside the idea or ideas that they believe to be most promising. This process is often called “dotmocracy.” You can allow people to distribute their stickers in any way they want: one sticker on each of three ideas, two stickers on one idea and another on a second idea, or all three stickers on one idea. (If you don’t have stickers, give each person a marker and ask them to put a mark beside their favorite ideas).
- *Cluster the ideas for more discussion*
  - ▲ If there are a few broad areas of interest, you can put those together and break the full group into smaller groups to discuss the merits of the ideas in their cluster, rank their ideas from most promising to least. Then the group can rejoin as a full group and discuss the most promising ideas together.
- *Scan the material and check whether all participants agree with the list*
  - ▲ In this case, you may eliminate some ideas that the group does not feel are appropriate and take the list away to work on at a staff level. In the case of

ideas that require research to determine how feasible they would be to implement, this is an appropriate way to deal with the ideas.

### **Step Three**

Engage in a discussion about the pros and cons of the top ideas. Continue to think creatively. Ask, “how can we do this in a way that nobody has ever done before?” Or, “what advantage will our group have in undertaking this idea that no other group has?”

## APPENDIX D : HOW TO FACILITATE A FOCUS GROUP

Focus groups are a powerful means to evaluate your organization's services or test new ideas, such as new programming. Basically, focus groups are interviews, but of 6-10 people at the same time in the same group. One can get a great deal of information during a focus group session.

Preparing for a focus group:

1. **Meeting objective** — Identify the major objective of the meeting. In this case, it will be to identify how well your organization is positioned in your community, or some similar communication-related objective.
2. **Focus Group questions** — Carefully develop your focus group questions. Always first ask yourself what problem or need will be addressed by the information gathered during the session. This will vary for each not-for-profit organization, but in the context of developing your communication plan, the list of questions that follow will provide you with a good guide to get started. Given that your focus group should last about an-hour-and-a-half, the most you can expect to cover is **five or six questions**.
3. **Inviting participants** — First, call potential participants to invite them to the meeting. Send those interested in participating a follow-up invitation with a proposed agenda, session time and place and list of questions the group will discuss. About three days before the session, call each participant to remind them to attend.
4. **Scheduling** — Plan the focus group to last one-and-a-half hours. Over lunch seems to be a very good time for working people to attend.
5. **Setting and Refreshments** — Hold sessions in a room with adequate air flow and lighting. Configure chairs so that all participants can see each other. Provide name tags for participants, as well. Provide refreshments, especially if the session is held over lunch.
6. **Ground Rules** — It's critical that all participants participate as much as possible, yet the session move along while generating useful information. Because the session is often a one-time occurrence, it's useful to have a few, short ground rules that sustain participation, yet do so with focus. Consider the following three ground rules: a) keep focused, b) maintain momentum and c) get closure on questions.
7. **Membership** - Focus groups are usually conducted with 6-10 members who have some similar nature, e.g., similar age group, status in a program, etc. Select members who are likely to be participative and reflective. Attempt to select members who don't know each other.
8. **Plan to record the session with either an audio or audio-video recorder.** Don't count on your memory. If this isn't practical, involve a note-taker.

## APPENDIX E: AUDIENCE PROFILING TABLE

<b>Audience</b>	<b>1</b>	<b>2</b>	<b>3</b>
Demographics: Age; Gender Location Income			
Why are they important to us – what do they offer?			
Is there a clear call to action? What do we want them to do, exactly?			
How will we know we've achieved success with them?			
What are their attitudes toward us; toward our issues?			
Values/motivators?			
Influencers/opinion leaders/messengers?			
What's in it for them? What do we offer them?			
Main sources of information? Eg. face-to-face, TV news			

