

# Strategic Communications Training



## Maui Nui Community Managed Makai Area Learning Network Lāhaina, Maui, Hawai‘i

September 6-8, 2013



## **Strategic Communications Training Report**

### **Maui Nui Community Managed Makai Area Learning Network**

This report summarizes the strategic communications planning workshop included as part of the Learning Network meeting held September 6-8, 2013 at Polanui, Lāhaina, Maui. The training goal was to introduce the communities to strategic communications, and to help them apply what they learned to current CMMA and community communications goals. The four trainers were:

- Evelyn Wight, Senior Communications Manager, The Nature Conservancy
- Sheila Saranghi, Projects Manager, SeaWeb Asia Pacific
- Sarah Bott, Education and Outreach Volunteer Coordinator, Ahihi-Kinau Natural Area Reserve, DLNR
- Manuel Mejia, Community-Based Marine Program Manager, The Nature Conservancy

Handouts and workshop materials are available in the Appendix.

The training included:

- Introduction to Strategic Communications
- Setting goals
- Context and Situation Analysis
- Targeting audiences
- Messaging and messengers
- Tactics and tools
- Measurement and evaluation

### **Introduction to Strategic Communications**

We are all communicating all the time – to family, friends, co-workers, and even strangers. While many people consider words primary, studies suggest that more than 70% of communications is non-verbal (examples include physical movement, tone of voice, eye contact, fidgeting, etc.). Words are essential, however, as is the person speaking them.

Strategic communications combines several disciplines to help people and organizations achieve specific goals. One way to start thinking about strategic communications is to brainstorm professions that might use it. Examples that are nearly always mentioned include:

- Marketing
- Public relations
- Lobbying
- Journalism
- Advertising

Strategic communications carefully considers the words (or message), but gives equal attention to the person speaking them, the audience, and most importantly, the intention or desired result. Rather than simply inform, strategic communications seeks to influence. Communities seeking to manage their own resources need to develop strategic communications skills for several reasons:

- Clarity and focus for message and audience
- Credibility
- Preparedness (ability to respond to opportunities, media, and opposition messages)
- Control (from advance planning), which helps manage stress
- Effectiveness (achieving the goal)

One simple definition of strategic communications is:

- The right stuff (message)....
- ...at the right time.....
- ...to the right people.....
- ...via the right channels (both messengers and mediums).....
- ...to achieve your goal.

Always keep in mind that strategic communication planning and implementation is fluid. A strategic communications planning process helps target a direction, audience and goal, but success may mean changing mid-stream to respond to new circumstances. Nimble responses to changes are a normal, and essential, aspect of communications.

One aspect that sets strategic communications apart is the focus on a goal, which means that many, if not all, messages will include a specific directive to the audience – an “ask” or “call to action” that will help achieve the goal. To illustrate this, the group watched a short video called “Mr. W” which can be found here: [http://www.youtube.com/watch?v=2mTLO2F\\_ERY](http://www.youtube.com/watch?v=2mTLO2F_ERY).

While entertaining, surprising, and captivating, the video is not necessarily an example of good strategic communications. It’s a great marketing/branding piece that creates a relationship between viewers and the Epuron brand, and humanizes its product, wind energy. From a strategic communications point of view, however, it lacks action toward a goal – there is no “ask” or “call to action” for viewers that can help achieve the organization achieve a goal.

The group also watched another video, this one from Dove’s “real beauty” campaign: <http://www.youtube.com/watch?v=XpaOjMXyJGk>. It could be viewed simply as a branding/marketing piece, but it does include additional elements. This video illustrates the value of visual storytelling, connection to emotion, and includes an “ask.”

## Setting goals

The first step in strategic communications planning is selecting objectives that are concrete, measureable next steps toward your goal. A strategic communications goal supports and enables an overall goal. Clearly defined objectives provide focus, direction, and clarity.

To formulate goals, brainstorm answers to these kinds of guiding questions to understand and prioritize goals:

- What is the change you are trying to create?
- What do you want to achieve over the long term?
- What will be different in your community after you have achieved your goal?
- Is this an action that can be done by your community with the resources you have, and within a specific time frame?
- Will it be possible to measure any changes afterwards?
- Is one or another of these objectives time-dependent?
- Do any have to happen in a specific order (e.g., which one(s) have to happen first)?
- Which objective will have the most impact on key decision makers and stakeholders?
- Which objective could cause the most negative impact if it is not completed?

Specific

Measureable

Attainable

Realistic

Time-bound

## Context and Situation Analysis

The next step is a quick context review, or situation analysis. This helps clarify the current internal and external conditions for the organization and community. Understanding the context includes examining the state of your own organization or group as well as the state of the overarching political and social circumstances in your community, including recent events and leading voices. The result of this step is a snapshot of your goal and organization in relation to other activities and circumstances in your community.

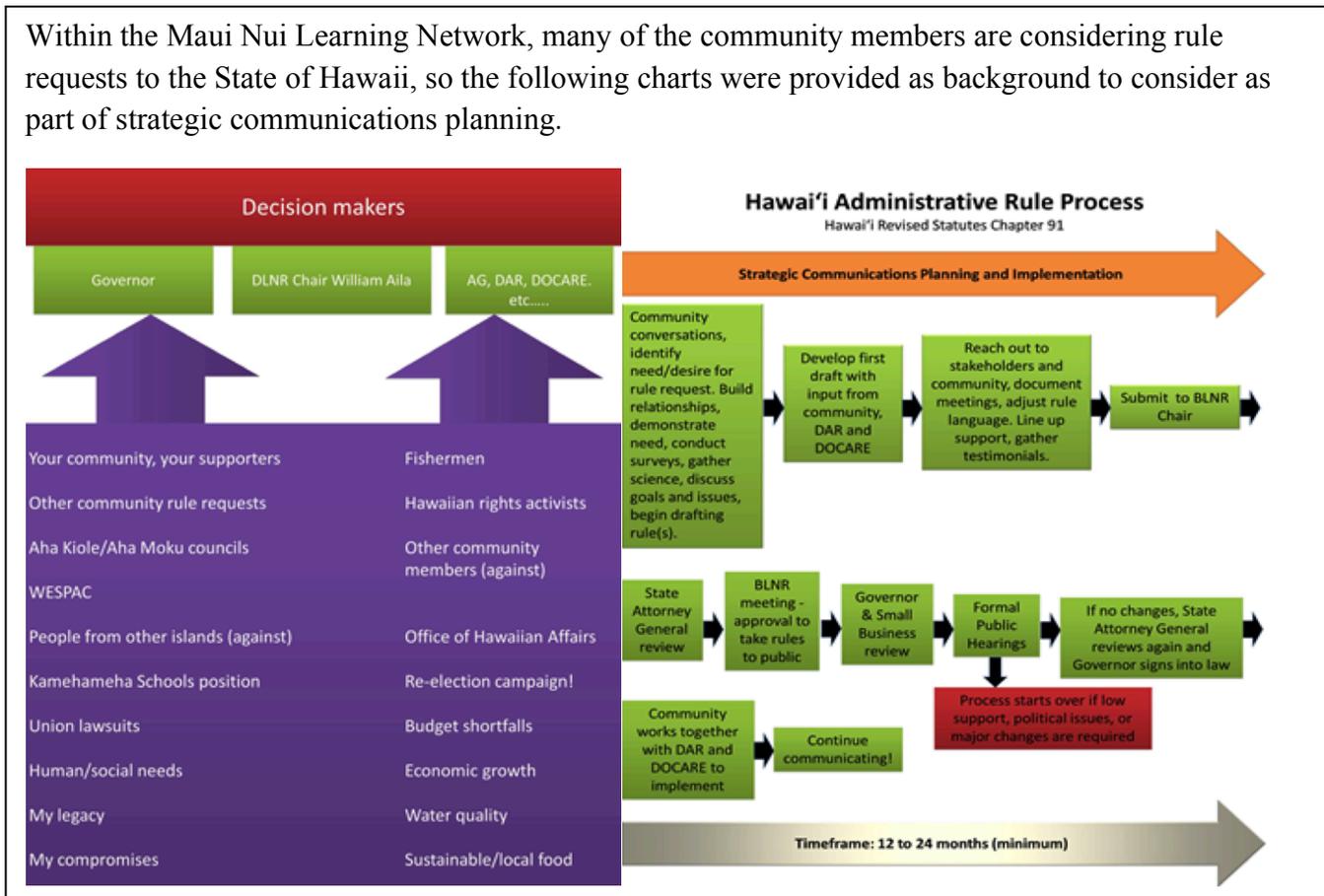
Brainstorm answers to the following questions to understand the external situation:

- What issues are being talked about in your community? In the media? What is happening in your community that may have an impact on your project?
- Where are we in the political (e.g., election) cycle?
- Is our group/topic/goal known about and being discussed? If so, what is being said about it? Who is saying it and are they a community/opinion leader?
- What voices are being heard? What voices are not being heard?
- If you are considering a rule or regulatory process, what other rules have come forward (or may come forward) and how might that affect your effort? Make sure you deeply understand the rule-making process and all the steps, inputs, potential roadblocks, and legal requirements.
- Who are the decision makers currently in office who could impact our goals and what are their beliefs, priorities, needs, and future plans?

Brainstorm answers to the following questions to understand your internal situation:

- Is your group in agreement on its goals and objectives?
- What resources does your group have available (e.g., people, budgets, reputation, relationships, etc.)?
- Does your group have allies (or opponents)? Who are they and what is their capacity to participate? What kind of relationships do they have with key leaders who are critical to your achieving your objectives?
- What challenges do you face in your community? Are there social or political concerns within your community that could draw attention or budget away from your goals?

Within the Maui Nui Learning Network, many of the community members are considering rule requests to the State of Hawaii, so the following charts were provided as background to consider as part of strategic communications planning.



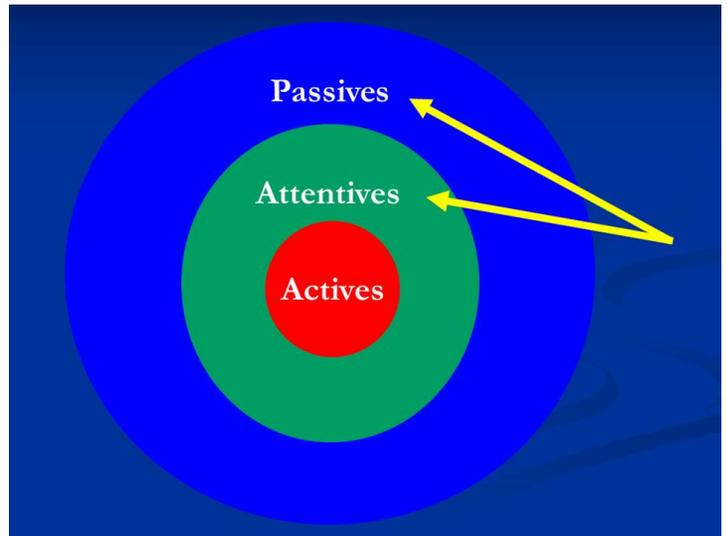
## Targeting Audiences

Targeting specific people and groups, like key decision makers and thought leaders, is an essential aspect of strategic communications. By targeting your communication efforts on key audiences, you can increase your chances of success, and save time, resources, and emotional energy.

A target audience can be a segment of a community (e.g., moms, young voters, fishermen) or a specific person who is a leader. It can be a group of decision makers or one critical decision maker. For any given objective, there are three broad audience segments:

- **ACTIVES:** people who are deeply invested, paying attention, and taking direct action, either for or against something (this is particularly true if you are attempting to create change in your community) – this is usually a relatively small group of people
- **ATTENTIVES:** people who are somewhat interested but not very involved – usually a moderate number of people
- **PASSIVES:** people who are not interested, not paying attention and not involved – this is usually the largest group of people

It is tempting to focus a lot of attention and energy on opposition voices (illustrated in this figure as “ACTIVES”). It is important to address their arguments, especially if they are talking with decision makers. However, it is usually not productive to engage with them directly, or attempt to persuade them. Chances are they won’t change their position (and neither will you), and you’ll end up frustrated and more polarized. A more strategic approach is to focus your time, energy and resources on two major categories of people:



- **ATTENTIVES and PASSIVES:** those who are somewhat interested but not very involved, and not likely to act without your influence (otherwise known as the “silent majority”)
- key people who can have a direct impact on the outcome, either by virtue of the position they hold (e.g., elected or appointed government official) or the influence they wield (e.g., kupuna, community leaders, church leaders, celebrities, trend-setters, etc.).

To develop a list of target audiences, it’s important to actually write names down and consider each person and group. These lists are confidential and for internal use only.

First, consider these kinds of questions:

- Who has final approval over the outcomes for this objective?
- Who has the power, influence, or authority to give you what you want?
- Who can influence a large group of other people who are important to your community, and/or to the key decision makers/leaders?

Then consider how these people may be linked to you or one another or decision makers by considering these types of questions:

- What connections do you have with this person/people?
- What is their background? Who are their trusted friends, associates, family members?

- Who do they count on for advice and input? Who do they trust and listen to most?
- If you can't influence this person, who can, and how can you connect with them?
- Who can persuade the decision maker to do what you want if you can't (e.g., voters)?

Then, identify the core concerns of each of these audiences, by considering these types of questions:

- What is important to this person (e.g., honor, impact, remaining in a leadership position either through election or other means, etc.)?
- What is important to the people this person trusts most/relies on/needs?
- What core values do you share with the people you want to influence?

Each audience may need a unique message, depending on their core concerns. Message development, and identifying the best messengers, are the next steps.

### Messaging and Messengers

Good messages are clear, consistent, repeatable, and appeal to your target audience(s), motivating them into taking action. Ideally, your messages will speak to your target audiences' already existing values, priorities, and emotions. A key guideline in developing good messages is: "It's not what you want to tell them, it's what they will hear."

The "Message Box" tool can help you develop and clarify key messages that are quick, to the point, and address your audience, in just four or fewer sentences. There are 4 components to the message box: value, benefit/vision, barrier, and ask.

Creating a message box starts with brainstorming for each target audience, and your objective for that audience. Then start brainstorming values using these kinds of questions:

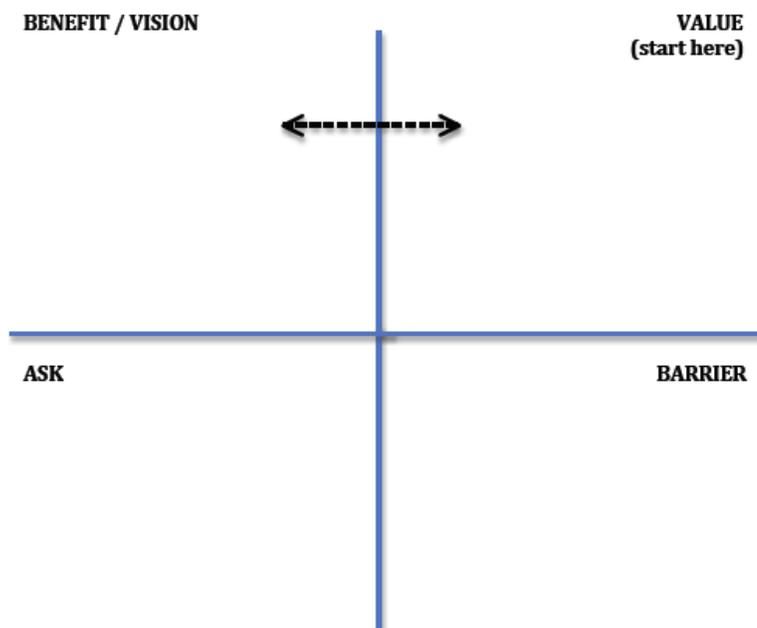
- What is the target audience's highest core concern?
- What is the target audience's priority?
- What "emotion" can you trigger about your issue? (Stay away from guilt and fear.)
- What does the target audience already believe in?

Once you've identified a key value, write it in the "Value" section of the message box.

Then start brainstorming barriers, moving clockwise, considering these kinds of questions:

- When you speak about your issue to your audience, what would they say as a counter-

TARGET AUDIENCE:  
OBJECTIVE:



argument? “Yeah, but... XX, XX, XX.”

- What existing belief or value do you have to overcome?
- What’s stopping your audience from doing what you ask? (i.e. cost, time, convenience)

Next, brainstorm your best response to these barriers. This is your “case” for this audience.

Write your final answer in the Barrier section the Message Box template. Then, start brainstorming your “ask” considering this question:

- What is the one, specific thing that you want your target audience to do?
- Note: Make sure your “ask” is clear and direct, within their comfort zone, and easy to do.

Finally, the Benefit/Vision section considers the following:

- What are the potential benefits to your target audience (specifically!) in doing the “ask”?
- What would the world look like if your audience does what you want them to do?
- Note: The Benefit/Vision portion should reflect the value of your audience (not necessarily your value). Brainstorm benefits the target audience might receive.

Each section of the message box is an element of your message to a specific audience. Just as important as the message, is who delivers it – the messenger. Select messengers by considering the following kinds of questions:

- Who does your audience trust?
- Who do they look to when forming their opinion?
- Does the person have the community’s interest in mind?
- If you’re speaking about a specific place, did they grow up, live, or have a special relationship with the area?
- Does the person have a personal interest, knowledge, and/or experience in the issue? (i.e. their credibility about the subject)
- Do they bring an authentic tone that people will believe is sincere?
- Will they demonstrate the desired Ask? (i.e. will they model the behavior)
- Is it important to have a person with similarities in age, gender, race?
- On the flip side, does the messenger have any potential risks or controversy that should be considered?

## **Tactics and Tools**

Once you have messages and messengers, the next step is determining which method is best for reaching your audience. There are many communication tools (or channels, in communications/marketing parlance), from face-to-face meetings to modern social media. Selecting the right tool can help you reach your audience, and become the leader in telling your story, rather than having others tell your story with their own slant. Choosing the right mix of communications tools will increase the chances achieving your strategic communications goals.

The first step is brainstorming tools that your audience has access to. Examples include social media, e-mail, newspapers, bulletin boards, etc. Other common tools include brochures, bumper stickers, and websites. Presentations at community meetings are a way to reach out, as are TV interviews, informal talk-story sessions, and advertising. Consider these kinds of questions to brainstorm tools:

- How does your target audience communicate with one another, with organizations?
- How do they prefer to receive information?
- Does your audience read news or watch TV news or get their news via Twitter?
- Who are trusted leaders for your audience? Who does your audience trust? What tools do they use to communicate with one another?
- Is this communication tool appropriate for your topic, issue and message?
- Is it feasible considering schedule and budget? How long will it take to create these tool(s), how much will it cost, and who will maintain it? In other words, can your organization afford to implement this idea?
- Have you considered hidden costs, such as media buys for getting a PSA shown on TV?
- How will you collect feedback?

## **Evaluation and Measurement**

Measure the effectiveness of your overall strategic communications plan to determine if you are being successful. Measurement helps you adapt to changes in context and audience, develop new messages and tools that will be more successful, and accommodate community developments and changes that are a normal part of life. Strategic communications planning is not complete without evaluation, followed by adaptation.

Perhaps the most important distinction in evaluating strategic communication is the difference between outputs and outcomes. A measure of an output such as the number of brochures printed and distributed does not assess the impact. The same is true for things like number of meetings, number of Facebook followers, and so forth.

To assess the effectiveness of strategic communications, evaluation must include a measure of outcomes, not just outputs. An outcome is tied to your goal. For example, if your goal is to have a rule passed through the State, some strategic communications measure could be did your target audience take the action requested in your “ask,” and did that “ask” help you achieve your goal? Or in other words, did the rule pass and by how much?

If your goal is to change opinions, one way to assess outcomes is to assess what people are saying and how they are saying it across communication channels. To change behavior (such as voluntary compliance with existing rules), an outcome measure could be the (hopefully declining) number of citations issued.

A before-and-after media analysis of how your issue is being reported on may also indicate if an outcome has been achieved. Simply counting up the number of stories, or media impressions, however, is an output, not an outcome.

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Additional resources: [www.futerra.co.uk/downloads/Branding\\_Biodiversity.pdf](http://www.futerra.co.uk/downloads/Branding_Biodiversity.pdf) ,  
[www.spitfirestrategies.com](http://www.spitfirestrategies.com), [www.thegoodmancenter.com](http://www.thegoodmancenter.com), [www.resource-media.org/visual-story-lab](http://www.resource-media.org/visual-story-lab), [www.comnetwork.org/2010/08/a-guide-to-evaluating-foundationnonprofit-communications](http://www.comnetwork.org/2010/08/a-guide-to-evaluating-foundationnonprofit-communications)

## **Appendices**

- Worksheets/handouts for each of the five sessions
- Bad press release example
- Story telling handout
- Communications Ethics handout
- Strategic Communications Plan outline template



**Maui Nui Community Managed Makai Area (CMMA) Learning Network**  
*Training the Trainers Workshop*

*Strategic Communications Planning*

**Session 1: Objectives and Context**

Prepared by Evelyn Wight<sup>1</sup> for the communities of Maui Nui

Saturday, 7 September 2013

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**Introduction**

Community goals are often big, broad, and can take many years (or even decades) to achieve. The first step in strategic communications planning is selecting objectives that are concrete, measurable next steps toward your goal. Without multiple, measurable objectives, it's easy to flounder. Clearly defined objectives provide focus, direction, and clarity.

For example, a local community may have a goal such as “protecting our reefs.” A successful strategic communications effort will focus on a specific action (or actions) that can help achieve that goal. Steps to “protecting our reefs” could include anything from decreasing littering (behavior change) to passing new rules and regulations (policy change).

Understanding the political, social, and resource constraints you are operating within could impact the objective you select to work on, as well as the overall outcomes.

**Purpose**

The purpose of this activity is:

- a) To provide guidelines for selecting communications objective(s)
- b) To provide guidelines for conducting a brief situational analysis that outlines your current political and social context

**Desired outcomes**

The desired outcomes of this activity are:

- a) Clarify and select a specific objective to focus your community's strategic communications efforts
- b) Conduct a brief situational analysis that outlines the current resource, political and social context in your community and in your organization

**Materials**

- a) Scrap paper, pens
- b) Flip chart or butcher paper
- c) Markers

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<sup>1</sup> If you have any questions or comments about this material, please feel free to contact me at ewight@tnc.org.

## Instructions for Objective(s)

Fundamentally, strategic communications planning is a flexible process that is responsive to the current situation. There isn't one right answer for objective setting. You will likely have multiple objectives over time, and they may change depending on the circumstances in your community, or the political situation.

Just as you've learned with the CAP process, the SMART acronym can be used to assess communication objectives. Objectives don't have to specify a communications action but they must be achievable within a reasonable time frame (such as 1 year). For example, a community may have a goal of ending childhood obesity in their town. There are many steps that could be taken toward that goal, and the goal would likely take many years to achieve as well as ongoing reinforcement to maintain.

Examples of some objective to focus on could include:

- changing school budgets or regulations around lunches
- conducting an educational campaign about health and fitness
- hosting a weight loss contest that raises money for a childhood disease
- replacing fast food vending with healthy snack choices in every middle school
- starting after-school exercise programs in 50% of public schools by 2014

## Exercise

As a group, discuss and describe your overall goal. Answering these questions can help guide the discussion:

- What is the change you are trying to create?
- What do you want to achieve over the long term?
- What will be different in your community after you have achieved your goal?

Brainstorm some of the steps that can help achieve your goal. Choose a note-taker who records all ideas, without judgment. Then examine each one to determine if it is a SMART objective.

- Is this an action that can be done by your community with the resources you have, and within a specific time frame?
- Will it be possible to measure any changes afterwards?

Another consideration is prioritization. These questions will help you address the order for completing objectives.

- Is one or another of these objectives time-dependent?
- Do any have to happen in a specific order (e.g., which one(s) have to happen first)?
- Which objective will have the most impact on key decision makers and stakeholders?
- Which objective could cause the most negative impact if it is not completed?

Specific  
Measurable  
Attainable  
Realistic  
Time-bound

Choose a specific, measurable next step that will help you accomplish your goal.

Revise as needed on scrap paper or on the table on the next page. Select the one(s) you can complete within the next 12 months to move toward your goal.

## Objectives

**Broad Goal:** What is the change you are trying to create? What do you want to achieve over the long term? What will be different in your community after you have achieved your goal?

**Objective:** What is a measurable step you can accomplish within the next 12 months (or less) to make progress toward your goal?

## Instructions for Context

Understanding the context includes examining the state of your own organization or group as well as the state of the overarching political and social circumstances in your community, including recent events and leading voices.

### Exercise

As a group, discuss and answer the following questions to understand the external situation:

- What issues are being talked about in your community? In the media? What is happening in your community that may have an impact on your project?
- Where are we in the political (e.g., election) cycle?
- Is our group/topic/goal known about and being discussed? If so, what is being said about it? Who is saying it and are they a community/opinion leader?
- What voices are being heard? What voices are not being heard?
- If you are considering a rule or regulatory process, what other rules have come forward (or may come forward) and how might that affect your effort? Make sure you deeply understand the rule-making process and all the steps, inputs, potential roadblocks, and legal requirements.
- Who are the decision makers currently in office who could impact our goals and what are their beliefs, priorities, needs, and future plans?

As a group, discuss and answer the following questions to understand your internal situation:

- Is your group in agreement on its goals and objectives?
- What resources does your group have available (e.g., people, budgets, reputation, relationships, etc.)?
- Does your group have allies (or opponents)? Who are they and what is their capacity to participate? What kind of relationships do they have with key leaders who are critical to your achieving your objectives?
- What challenges do you face in your community? Are there social or political concerns within your community that could draw attention or budget away from your goals?

After your discussion, summarize your situation in the table on the next page. Keep this short and to the point – try to keep it one page.

Remember, a situation analysis is a snapshot to help you understand where you are in relation to other activities and circumstances in your community. Like other aspects of strategic communication planning, situations are likely to change over time. Nothing ever stays the same - so it's helpful to continue to keep changing contexts in mind as you move forward.

## Context

### External situation (brief description)

**Assets (short list):**

**Challenges (short list):**

### Internal situation (brief description)

**Assets (short list):**

**Challenges (short list):**

Source: Spitfire Strategies Smart Chart 3.0

**Maui Nui Community Managed Makai Area (CMMA) Learning Network**  
*Training the Trainers Workshop*

*Strategic Communications Planning*

**Session 2: Targeting Audiences**

Prepared by Evelyn Wight<sup>1</sup> for the communities of Maui Nui

Saturday, 7 September 2013

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**Introduction**

No matter how many resources you have, it is impossible to reach all the people in any given community. However, it isn't necessary to reach everyone. Strategic communications can help you target the key decision makers and thought leaders that can impact your ability to achieve your objectives. Different people have different levels of influence and authority. By targeting your communication efforts on key audiences, you can increase your chances of success, and save time, resources, and emotional energy.

A target audience can be a segment of a community (e.g., moms, young voters, fishermen) or a specific person who is a leader. It can be a group of decision makers or one critical decision maker. For any given objective, there are three broad audience segments:

- people who are deeply invested, paying attention, and taking direct action, either for or against something (this is particularly true if you are attempting to create change in your community) – this is usually a relatively small group of people
- people who are somewhat interested but not very involved – usually a moderate number of people
- people who are not interested, not paying attention and not involved – this is usually the largest group of people

It is tempting to focus a lot of attention and energy on opposition voices. They tend to be loud and attract media attention. It is important to address their arguments, especially if they are talking with decision makers. However, it is usually not productive to engage with them directly, or attempt to persuade them. Chances are they won't change their position (and neither will you), and you'll end up frustrated and more polarized. A more strategic approach is to focus your time, energy and resources on two major categories of people:

- those who are somewhat interested but not very involved, and not likely to act without your influence (otherwise known as the “silent majority”)
- key people who can have a direct impact on the outcome, either by virtue of the position they hold (e.g., elected or appointed government official) or the influence they wield (e.g., kupuna, community leaders, church leaders, celebrities, trend-setters, etc.).

Ultimately, you want to target the individual or individuals who have decision making power over your objective. In government processes, the key decision makers are often known and the challenge is to

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<sup>1</sup> If you have any questions or comments about this material, please feel free to contact me at ewight@tnc.org.

connect with and influence them. But for every audience, it is important to find out what they care about and value – it may not be what is important to you, and it may be completely different from what you think it is. The best way to do this is to ask, either directly or indirectly. It's also important to find out as much as possible about relationships and the formal and informal agreements and contracts people have with one another - in other words, the politics and obligations behind the scenes.

Research tools such as polling and focus groups are effective in part because they create anonymity that leads to clear, statistically relevant information. Many community groups don't have the budgets and time to conduct that kind of formal research. Luckily, there are other ways to gather information. One obvious way is to be involved in your community. Another is to ask people inside and outside your community who they listen to, who they see having influence, and what they think the big issues are. It's also possible to get information through a literature search, a media analysis related, or online searches for articles, social media posts and blogs related to your objective and your community. Sometimes other organizations or non-profits who have conducted polling can share their data. And some local and national polling groups share data or have reports available online.

Confirming and expanding upon your understanding of your target audiences will help you develop messages that address their values, resonate with their interests, and ultimately, achieve your goal.

### **Purpose**

The purpose of this activity is:

- a) To understand the rationale for targeting decision makers and influence/thought leaders, and targeting segments of the community rather than trying to reach everyone or reacting and your opposition
- b) Develop a list of the audiences to target for a specific objective

### **Desired outcomes**

The desired outcomes of this activity are:

- a) A list of the audiences to target for a specific objective
- b) A list of specific people you will target (names)

### **Materials**

- a) Scrap paper, pens
- b) Flip chart or butcher paper
- c) Markers

### **Instructions**

Write down the objective your group will focus on and keep it in front of you during the exercise to focus your discussion.

On either scrap paper or flip chart paper, draw lines to make 3 columns. At the top of the first column, write "Decision maker/leader." At the top of the second column, write "Links." At the top of the third column, write "Core Concerns."

Consider these questions as you write down names (and titles, as applicable) on the list of decision makers/leaders:

- Who has final approval over the outcomes for this objective?
- Who has the power, influence, or authority to give you what you want?
- Who can influence a large group of other people who are important to your community, and/or to the key decision makers/leaders?

Consider these questions as you write names or actions on the list of links:

- What connections do you have with this person/people?
- What is their background? Who are their trusted friends, associates, family members?
- Who do they count on for advice and input? Who do they trust and listen to most?
- If you can't influence this person, who can, and how can you connect with them?
- Who can persuade the decision maker to do what you want if you can't (e.g., voters)?

Consider these questions as you write things down on the list of core concerns:

- What is important to this person (e.g., honor, impact, remaining in a leadership position either through election or other means, etc.)?
- What is important to the people this person trusts most/relies on/needs?
- What core values do you share with the people you want to influence?

**Example**

Objective: Replace fast food vending with healthy snack choices in every school in our town

<b>Decision maker/leader</b>	<b>Links</b>	<b>Core Concerns</b>
State Superintendent of Education	Her secretary went to high school with my cousin	Reputation, budget, federal laws
Board of Education members (elected)	2 of us go to the same Church as the most influential board member; that board member works for the vending machine company	Reputation, influence, re-election, provisions in our schools for our children
School Principal	New principal, doesn't have many local contacts yet, wants to make good impression	Reputation, budget, discipline, test scores, federal compliance
Doctors, nurses	My doctor is head of the local medical association and has influence over them	Health of children in our community, in our school
Parents	We are all parents and know other parents; one of us is a freelance writer who blogs about kids	Health of my children
PTA	3 of us are on the PTA at our local school	Health of children, school budget/provisions for kids

\*\*Note: this rough example may not be accurate and is just for illustration

**Maui Community Managed Makai Area (CMMA) Learning Network**  
***Training the Trainers Workshop***

**Session 3: Messaging and Messenger Identification**

Prepared by Sheila Sarhangi<sup>1</sup> of SeaWeb Asia Pacific for the communities of Maui Nui

Sept. 6 – 8, 2013

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**Introduction**

At this point, you should have identified your goal, selected the first objective that will get you one step closer to meeting that goal, and defined the target audience (e.g. decision makers, influencers, etc.) who can make that objective a reality.

**Messaging**

For this exercise, you will create a message through the “Message Box” that will not only appeal to your target audience, but will also motivate them into taking action about your issue. The key take-away of this exercise is to create a message that will speak to their already existing values, priorities, and emotions of your target audience. Another important result of this exercise is a message that is quick, to the point, and addresses key concerns, in just four or less sentences.

You can use the “Message Box” to prepare for the following:

- Presentation / Lecture / Speech
- Proposal to funder
- Media interview
- Writing a story, opinion editorial, creating a video
- Press release content
- Communications strategy

**Messenger**

The second portion of this exercise is to select messengers that will deliver your message. These individuals should be selected carefully, and vetted through criteria established within your group. The aim is to choose people that your target audience can identify with and trust.

*Purpose*

The purpose of this activity is:

- a) To provide a process in which your community can create messages that will motivate the target audience into taking action
- b) To provide a criteria framework in which your community can identify messengers that will best represent your message to your target audience

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<sup>1</sup> If you have any questions or comments on this material, please feel free to Sheila Sarhangi at [ssarhangi@seawebap.org](mailto:ssarhangi@seawebap.org)

### *Desired outcomes*

The desired outcome of this activity is:

- a) To develop powerful messages for target audiences
- b) To create a list of potential messengers to deliver your message

### *Materials*

- a) Message box template (See Figure 1)
- b) Flip chart or butcher paper
- c) Tape
- d) Markers

### ***Instruction for MESSAGING***

The first portion of this activity is to identify the main message that will be delivered to your target audience. Think of this as your elevator speech.

- 1) On one piece of flip chart paper, write your identified target audience (e.g. the person that can make your objective a reality, such as a legislator, mothers of young children, teenage smokers, fishermen in a community, etc.). This will serve as a reminder throughout the exercise of the audience in which you are creating the message for.
- 2) On the same flip chart paper, write down your objective. This will serve as a reminder throughout the exercise that you are developing a message to achieve this specific objective only.
- 3) Place this piece of paper on a wall so that everyone in your group can view it throughout the exercise.
- 4) On a new piece of flip chart paper draft the Message Box template (See Figure 1) and place on a wall so that everyone in your group can view it throughout the exercise.
- 5a) On a new piece of flip chart paper, write a sentence or phrase that addresses their Values in relation to your issue. Do this by brainstorming answers to the following questions:
  - What is the target audience's highest core concern?
  - What is the target audience's priority?
  - What "emotion" can you trigger about your issue? (Stay away from guilt and fear.)
  - What does the target audience already believe in?

Note: You don't need to answer all of these questions, just the ones that help.  
Keep in mind: "It's not what you want to tell them, it's what they will hear."

Note: You may need to do research to discover the perceptions and current beliefs of your audience when it comes to your issue, in order to avoid making assumptions. You can do this by asking for feedback in intercept surveys, interviewing key informants, conducting focus groups, and more. You can also see if research has already been done that's relevant to your issue universities, Web sites, partner organizations, etc.

Examples:

- *To target moms to speak up against new coal plants*  
*Moms care about the health of their kids → “You want clear air for your kids.”*
- *To target legislators for a bill*  
*Legislators care about how much an initiative will cost, or how voting for/against legislation will affect their re-election. → “You want to create more revenue for the state while being responsive to your constituents.”*
- *To target teenagers to stop smoking*  
*Teenagers care about their image, and also independence. → “You are in control of your life.”*
- *To target residents to take action in an area:*  
*Residents of an area may have a lot of pride in their community → “Our bay represents who I am, and who we are as a community.”*

5b) Write your final answer to in the Value portion of the Message Box template.

6a) Once you have completed the Value portion, move in a clockwise direction to the Barrier portion. On a new piece of flip chart paper, brainstorm answers to the following questions:

- When you speak about your issue to your audience, what would they say as a counter-argument? “Yeah, but... XX, XX, XX.”
- What existing belief or value do you have to overcome?
- What’s stopping your audience from doing what you ask? (i.e. cost, time, convenience)

Examples:

- *Moms: Yeah, but the wind blows pollutants away; it doesn’t affect my area or my family personally.*
- *Legislators: Yeah, but this won’t raise the funds we need. I’ve seen this before.*
- *Teenagers: Yeah, but I’m not being controlled. It’s my choice to smoke.*
- *Residents: Yeah, but we can’t do anything to change what’s happening in my area; we’re small compared to big developers.*

6b) Take a look at those barriers, and now brainstorm your best response.

Note: This portion of the exercise is your “case” against your audience’s response.

Examples:

- *To target moms: More than xx kids in the neighboring county have increased asthma conditions because of nearby coal plants.*
- *To target legislators: This bill will create XX funds and XX jobs, right here in our county/state.*
- *To target teenagers: One tobacco company actually added twice the amount of nicotine to cigarettes to make smoking more addictive.*

- *To target residents: If each person does XX, we can make big change.*

6c) Write your final answer to these questions in the Barrier portion of the Message Box template.

7) Once you have completed the Barrier portion, move in a clockwise direction to the Ask portion. On a new piece of flip chart paper, brainstorm answers to the following question:

- What is the one, specific thing that you want your target audience to do?
- Note: Make sure that what you are asking is clear and direct, within their comfort zone, and easy enough to do (e.g. does not have multiple actions or barriers).

Examples:

- *To target moms: Email your legislator. / Testify at the city council meeting.*
- *To target legislators: Vote yes on this bill.*
- *To target teenagers: Re-think who's in charge. Consider quitting. Here's how.*
- *To target residents: Come volunteer at this event. / Take this fish only when its XX size.*

8) Write your final answer in the Ask portion of the message box template.

9) Finally, you are in the Benefit/Vision section of the document. On a new piece of flip chart paper, brainstorm the answer to the following question:

- What are the potential benefits to your target audience (specifically!) in doing the Ask?
  - What would the world look like if your audience does what you want to do?
- Note: The Benefit/Vision portion should reflect the Value of your audience. So, make sure that you are brainstorming benefits that the target audience might receive.

Examples:

- *To target moms: Your kids are healthier without nearby coal plants.*
- *To target legislators: Supporting this bill could secure jobs and also help you get re-elected.*
- *To target teenagers: You are in charge and much cooler to your friends when you don't smoke.*
- *To target residents: The sense of place in our community, and the wonder and awe of this area will remain.*

10) Congratulations, you've finished the Message Box! Take a look at what you've created and make sure it hits the key points of your issue. It's important to know that the Message Box can be changed to fit the challenges of your issue.

### ***Instructions for MESSENGER IDENTIFICATION***

The second part of this activity is to identify the messenger that you will use to deliver your message.

- 11) Select from the criteria below (or add your own!) and make a list of potential messengers that match what you have outlined.
- Who does your audience trust?
  - Who do they look to when forming their opinion?
  - Does the person have the community's interest in mind?
  - If you're speaking about a specific place, did they grow up, live, or have a special relationship with the area?
  - Does the person have a personal interest, knowledge, and/or experience in the issue? (i.e. their credibility about the subject)
  - Do they bring an authentic tone that people will believe is sincere?
  - Will they demonstrate the desired Ask? (i.e. will they model the behavior)
  - Is it important to have a person with similarities in age, gender, race?
  - On the flip side, does the messenger have any potential risks or controversy that should be considered?

Note: Make sure you have the right people in the room who can vet potential messengers and be sensitive to issues that others may not be aware of.

#### Examples:

- *Celebrity chefs regarding purchasing sustainable seafood / not marine resource managers*
- *Sport stars speaking to kids about studying / not teachers*
- *Moms speaking about coal plants and their kids' health / not clean energy activists*
- *Fishermen going to legislators / not scientists*
- *Wives speaking to their husband about health check-ups / not doctors*

#### Resources:

Spitfire Strategies; SeaWeb; Andy Goodman; Visual Story Lab, a project of Resource Media

Figure 1.

TARGET AUDIENCE:  
OBJECTIVE:

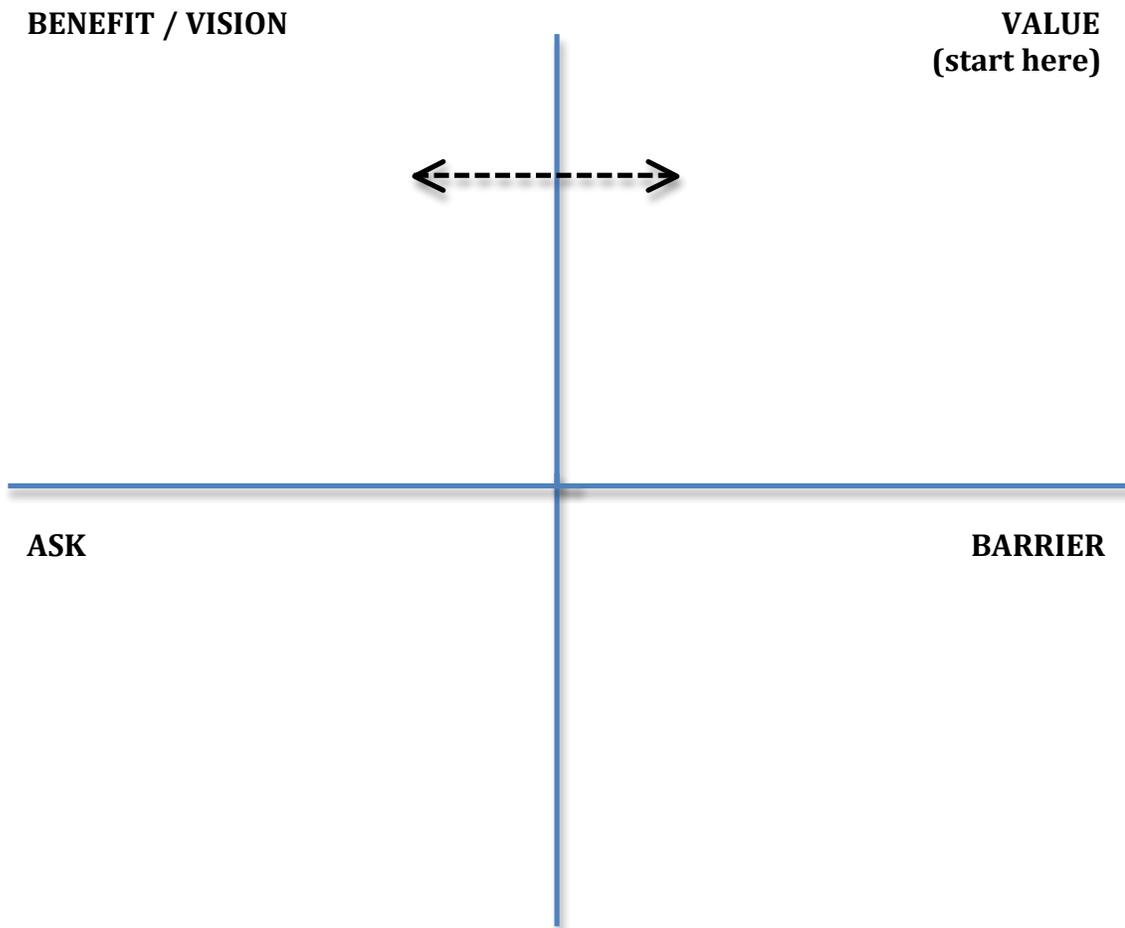
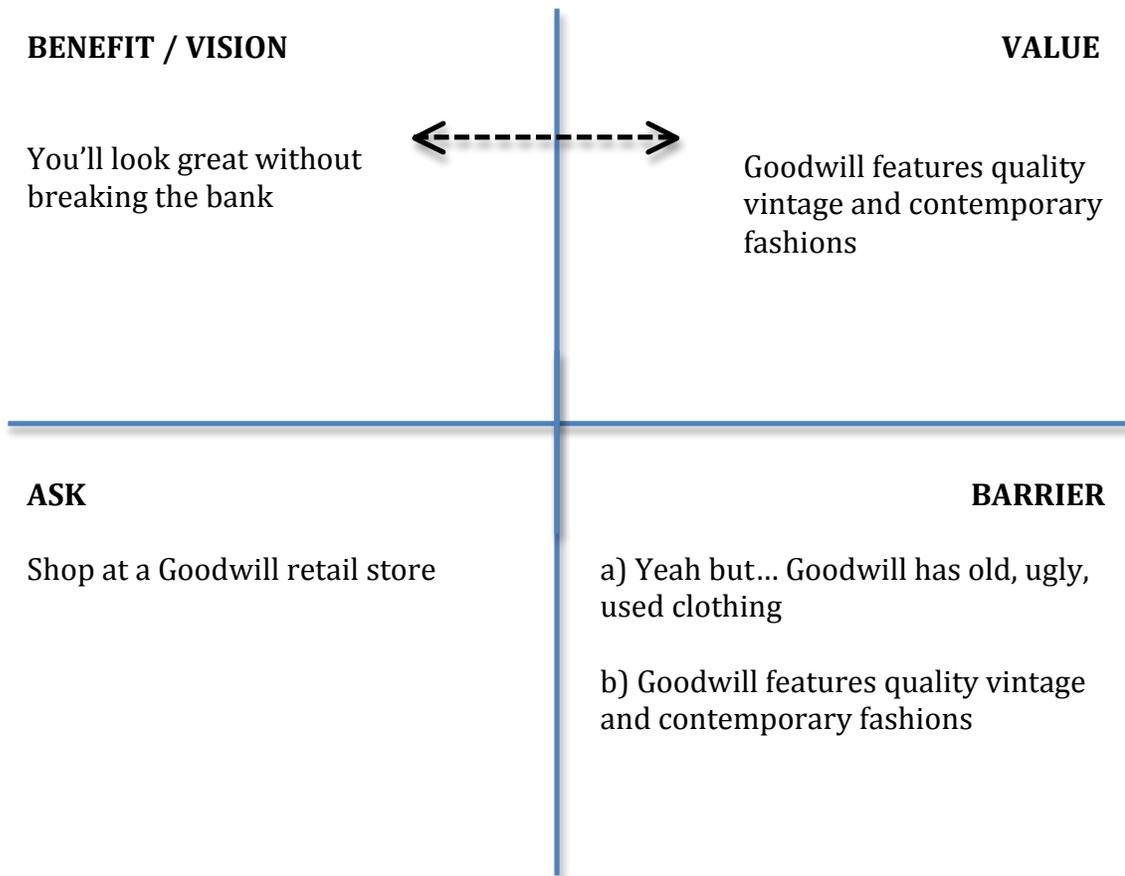


Figure 2.

TARGET AUDIENCE: *Young professionals*

OBJECTIVE: *Motivate young professionals to shop at Goodwill*



## Maui Community Managed Makai Area (CMMA) Learning Network

### *Training the Trainers Workshop*

### *Strategic Communications Planning*

### **Session 4: Tactics and Tools**

Prepared by Sarah Bott for the communities of Maui Nui

Sept. 6 – 8, 2013

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#### ***Introduction***

At this point, you have identified some potential goals, messages, and messengers. You will now focus on identifying communications tools and the tactics by which you will use those tools.

An effective communications program will combine different tools to communicate the intended message(s) to the target audience. Communications tools can include:

- Internet
- Publications and other print materials
- Public service broadcasts and Videos
- Media relations
- Spokespersons
- Events (special days, awards, exhibitions, seminars)
- Other.

Communications tactics are the concrete steps and techniques by which you use the tools. When you consider which tools you might use, make sure that you think about the tactics involved in using the tools effectively.

*Examples:*

<b>Tool</b>	<b>Tactic</b>
Brochure	Text and pictures that make up the content
Media Interview	Interview prep; answers to potential questions; key messages; practice interview
Facebook	Individual posts
Flyer	Text and pictures that make up the content

The tools you will use will depend on your strategic goals, profile of the target audience, the various advantages and disadvantage of each tool, and the communications budget.

Whichever tools are used, it is important to maintain consistency in the aesthetic appearance, linguistic style and tone, and message (including facts, figures, slogans, quotations) used in all the

communications products for a single campaign. Without this consistency, the message will not be as effective, even if the target audience is exposed to several of the communication products. Worse still, a lack of consistency may confuse or distract the target audience (with them not realizing they are getting communication from the same organization or for the same effort).

It is common to think first of modern tools and not take into consideration tools that have been around and used effectively for many years. While Twitter, Facebook, Blogs, and Websites are effective modern tools, don't forget the humble (and potentially powerful) telephone call and thank you note.

Understanding your target audience is of critical importance. What is their age, income, gender, ethnicity, etc? Where do they get their information and how do they commonly communicate? Do they read the daily newspaper or get most of their news from their grapevine? Do they use their phone to send text messages?

### ***Exercise***

Review the examples in the table below. For each participant, identify an organizational goal and work through the columns to identify the elements listed.

#### *Desired outcomes*

- a) A completed matrix identifying goals, messages, tools, tactics, and success metrics;
- b) Improved group and understanding about how to choose tools that will result in greatest success achieving organizational goals.

#### *Materials*

- a) Flip chart or butcher paper
- b) Markers

#### *Instructions*

- a) Review example
- b) Each participant (or group) take turns filling out grid, with discussion and input of group.
- c) Consider who will do the actual work – perform the tactics – required for the use of each tool.
- d) Consider how easy or hard it will be for you to use the tools. What do you use easily to communicate for fun, hobby, keep in touch, etc.? If you are going to be the primary communicator, consider using tools you are already good at if you do not have time or the opportunity to learn and use new tools.

Organizational Goal	Key Messages	Tools	Tactics	Success Metrics
<p>Example: Commemorate 90<sup>th</sup> birthday of the Wikiwiki Swim Club</p>	<p>Example:</p> <ul style="list-style-type: none"> <li>• We were the first swim club on Maui</li> <li>• We are the oldest swim club on Maui</li> <li>• Members patrol coastline and report illegal activity (wildlife harassment, illegal harvesting, etc)</li> <li>• We need to raise \$10,000 to buy a new canoe for shore patrols</li> </ul>	<p>Example:</p> <ul style="list-style-type: none"> <li>• Facebook post</li> <li>• Instagram</li> <li>• Letter to the Editor</li> <li>• Blog</li> <li>• 5-minute chat in grocery store</li> </ul>	<p>Example:</p> <ul style="list-style-type: none"> <li>• Take photographs of members in action</li> <li>• Member writes a 1-page narrative about a specific experience</li> <li>• Member writes a 2-page narrative about experiences over the years of their participation</li> <li>• Staff writes 1-page narrative about role / importance / impact of organization in community</li> </ul>	<p>Example:</p> <ul style="list-style-type: none"> <li>• Likes, Shares, and Re-Tweets</li> <li>• Published letter to the editor</li> <li>• Article in newspaper or mention on radio</li> <li>• Donation tracked back to communication (eg chatting with someone in grocery store)</li> </ul>
<p>Example #1</p>				
<p>Example #2</p>				
<p>Example #3</p>				

**Maui Community Managed Makai Area (CMMA) Learning Network**  
*Training the Trainers Workshop*

*Strategic Communications Planning*

**Session 5: Evaluation and Measurement**

Prepared by Manuel Mejia<sup>1</sup> of The Nature Conservancy of Hawaii  
for the communities of Maui Nui

Sept. 6 – 8, 2013

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**Introduction**

By now, you have developed some experience and savvy at setting strategic communications goals, objectives, context, targeting audiences, honing messages, and selecting communications tools that reach your audiences. The final step is measuring the effectiveness of your overall strategic communications plan to determine if you are being successful. Measurement helps you adapt to changes in context and audience, develop new messages and tools that will be more successful, and accommodate community developments and changes that are a normal part of life. Strategic communications planning is not complete without evaluation, followed by adaptation.

*Purpose*

The purpose of this session is:

- a) To provide an overview on Evaluation & Measures and an appreciation for its importance in helping your communication and advocacy efforts.
- b) To brainstorm about what measures you might use to evaluate your communication efforts.

*What is Evaluation?*

Many people have mixed ideas and feelings about evaluation – they get nervous or dread it. Am I being audited? Judged via a performance appraisal? Is it really necessary? Do we have time for this? However, it shouldn't be viewed as a negative thing. On the contrary, it is a great practice that can help you improve your project, or process. Lessons gleaned from it can inform strategy for your programs—welcome it!

In this age of ever increasing environmental challenges and shrinking public and growing competition for private funding, implementation of your advocacy work alone is not enough to change things. As malama aina efforts increase, nonprofits and their funders want to know what impact they are having. Evaluation is a tool that can not only

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<sup>1</sup> If you have any questions or comments on this material, please feel free to contact Manuel Mejia at [mmejia@tnc.org](mailto:mmejia@tnc.org) References: “Are We There Yet? A Communications Evaluation Guide” by the Communications Network and Asibey Consulting. Also, “Speaking for Themselves—Advocate’s Perspectives on Evaluation” by Innovation Network, Inc.

demonstrate impact, but also strengthen future efforts. Overall, evaluation empowers grantees and ensures greater effectiveness.

EVALUATION is defined as “the systematic collection of information about a program that enables stakeholders to gain better understanding of the program, improve its effectiveness, and/or make decision about future programming.” It is a mechanism to track progress towards goals, processes and impacts. Lessons from evaluation can be used to inform and modify strategy. Evaluation is a tool for continuous reflection, learning, and improvement. Evaluation activities should happen throughout the lifetime of your efforts, so that you can learn from your own work and change course as needed.

Some common evaluation techniques include:

- Interviews
- Focus Groups
- Surveys (Online and In-Person)
- Observation
- Quantitative data collection
- Quantitative data analysis
- Content analysis

### **Evaluation questions**

Consider these questions to begin evaluating your strategic communications strategy: (from Lisa Dropkin, Edge Research, via SeaWeb)

- Did you reach the audiences you targeted?
- Are your audiences taking the actions you asked them to do?
- Did you convert new supporters?
- Did you develop new relationships?
- Did you move awareness?
- Did you elevate other supporters’ voices?
- Is there new discussion of solutions?
- Did you sustain your effort?
- Is your network stronger?

### **Contribution, not attribution.**

Another thing to consider is that given the nature of our work, which relies on partnerships and networks, evaluation should demonstrate contribution, not attribution. Attributing success in our line of work is like demonstrating impact

It is costly, time-consuming, and often results in inconclusive findings. “Proving” attribution—exactly who was (or was not) responsible for a final “win” –rarely helps advocates like us to work better together. It shifts the spotlight to far-off, long-term outcomes such as policy wins or systems change, instead of keeping the focus on the work happening now. In contrast, demonstrating contribution is relatively easy to accomplish, and provides useful results that lead to immediate improvement. Evaluations

conducted to show contribution are less technically demanding and more accessible to a larger audience.

### **Find a balance between numbers and stories.**

Advocates such as yourself change the world. Evaluation can help, by telling advocates if victory is two hundred yards or two hundred miles away. Knowing when to make an all-out sprint to the finish line and when to stick to a slow and steady pace can make all the difference.

### **Resources you will need:**

#### **Staff time**

Given how busy you are and everything on your plate, you will need a dedicated person to focus and conduct evaluation. Because it is an important practice, find and match your volunteers or staff who can focus on this. Come up with a plan that specifies who will do what. Come up with the evaluation questions together. After, discuss it and learn from it. Conducting evaluation internally will cost less than hiring a consultant.

#### **Budget**

According to “Are We There Yet—A communications evaluation guide” the budget for evaluation should be in the 5-7% range. While there is no hard rule, any less than this is not enough.

#### **Measures**

“While the ultimate measure of conservation success is biological, the way by which we achieve it is purely social, economic and cultural.” --Alcorn.

Empowerment can't be measured with a thermometer. Advocates have an intuitive sense that success is occurring, but where this success isn't concrete, it often remains untracked. Simply put, “you can't report what you don't track.”

Keep a good mix of figures and stories. This will paint a fuller picture.

Measures—why and for what?

Increased awareness is one of the interesting outcomes or benchmarks that can help you see if a campaign is on track.

### **Practical Tips**

#### **Be realistic!**

- make sure that your objectives are realistic in the first place. That said, don't set trivial objectives nor overreach. Find the balance between stretching yourself yet staying within reach.

- ensure that enough resources are invested in evaluation to get meaningful results, but be proportional

## Track meaningful measures

It is common to measure outputs in communications. Examples of these include # of brochures, # of “likes” on a Facebook page, or number of media articles in response to a press release. Sometimes, these kinds of measures are needed for reporting to sponsors. However, they do not necessarily measure impact. In case you need to track outputs, here are some examples.

### Events

Keep track of number of attendees and gather list of participants, contacts and journalists.

Prepare a questionnaire for feedback or conduct a brief online survey after your event.

### Online tools

If you have online tools, make sure you track numbers of interactions, such as website hits in connection with certain events, Facebook ‘likes,’ followers, etc.

### Publications

If you have print tools such as brochures, newsletters, or other materials, keep track of who received your publications (distribution lists) and the number of publications disseminated.

## PRACTICE

### Draft your Measurements

What are the most meaningful milestones that will demonstrate progress toward your objective? How will you measure them? Remember, you want to track outcomes, not outputs. Use the question above to help you think about outcome measures.

Objective: \_\_\_\_\_

Milestone A	Milestone B	Milestone C
Measures	Measures	Measures
1.	1.	1.
2.	2.	2.
3.	3.	3.

Subject: Manoa: New mineral, krotite, named after UH Manoa researcher

UH News Release link: <http://manoa.hawaii.edu/news/article.php?aId=4415>

New mineral, krotite, named after UH Manoa researcher

The first natural occurrence of a low-pressure  $\text{CaAl}_2\text{O}_4$  mineral has been found in a refractory inclusion in a carbonaceous chondrite meteorite. While synthetic low-pressure and high-pressure  $\text{CaAl}_2\text{O}_4$  phases are well known in the field of materials science, only the high-pressure polymorph had been identified previously in nature (in another chondrite). Quantitative elemental microanalysis of the new mineral using the electron microprobe resulted in an empirical formula (based on four oxygens) of  $\text{Ca}_{1.02}\text{Al}_{1.99}\text{O}_4$ . It is now officially approved by the Commission on New Minerals, Nomenclature, and Classification of the International Mineralogical Association as 'krotite'.

The mineral's name honors Dr. Alexander N. Krot, a University of Hawai'i at Manoa researcher known for his achievements in meteoritics, especially for studies of the formation of calcium-aluminum-rich inclusions (CAIs) and chondrules, and his significant contributions to the understanding of early solar system processes. Krot is also a 2004 recipient of the University of Hawai'i Regents' Medal for Excellence in Research.

Krotite is the dominant mineral in the central and mantle areas of an unusual CAI in the NWA 1934 carbonaceous chondrite. The 2.75 mm x 4.5 mm inclusion is composed mainly of aggregates of krotite crystals, with a few other calcium-aluminum or magnesium-aluminum oxides and a few silicates in a thin rim of concentric layers. Cracks, mainly filled with iron and aluminum hydroxides, crosscut the CAI's rim and parts of its interior giving it a "cracked egg" appearance. The CAI itself is surrounded by a matrix of mostly fine-grained olivine.

The discovery team suggests formation in a highly refractory condensate/evaporative environment in the cooling nebular gas. They say that the primary mineral assemblage in this CAI was introduced into a hot gas, which did not melt the CAI but perhaps reacted with surficial krotite crystals to produce the observed layered rim. The cracks may have been caused by compaction during accretion of the parent body, but the meteorite as a whole is essentially unshocked. A final, probably terrestrial, alteration process most likely filled the cracks with hydrated oxides during exposure to the northwest African environment. This CAI, along with its new mineral, krotite, will be the subject of additional research to determine formation and cosmochemical details. Because CAIs were the first solids formed in the solar nebula about 4.6 billion years ago, they help cosmochemists piece together records of nebular and early solar system processes and how the first solid building blocks eventually turned into asteroids and planets.

Ma, C., Kampf, A. R., Connolly, Jr., H. C., Beckett, J. R., Rossman, G. R., Sweeney Smith, S. A., and Schrader, D. L. (2011) Krotite,  $\text{CaAl}_2\text{O}_4$ , A New Refractory Mineral from the NWA 1934 Meteorite, *American Mineralogist*, v. 96, p. 709-715. doi:10.2138/am.2011.3693.

For more information, visit: Discovery of New Mineral, Krotite, in a CAI

<http://www.psr.d.hawaii.edu/CosmoSparks/May11/krotite.html> or Dating the Earliest Solids in our Solar System <http://www.psr.d.hawaii.edu/Sept02/isotopicAges.html>

**Maui Nui Community Managed Makai Area (CMMA) Learning Network**  
Polanui Hiu, 393 Front Street, Lāhaina, Maui

**Train-the-Trainers Workshop – Strategic Communications Planning**

**Storytelling Tip Sheet**

Prepared by Sheila Sarhangi<sup>1</sup> for the communities of Maui Nui

*“Stories shape almost everything we believe. The ideas, the conflicts, and the truths we find in them...” – Andrew Stanton*

Storytelling can be a powerful way to connect people to your cause or organization. As humans, we have been telling stories for ages; it's an essential part of how we communicate with one another. But what makes a good story? And how do you know that you have a story worth telling? This tip sheet will help you think through the key points of your story, whether targeted for a funder, to get people involved in your organization, or for a major news outlet.

**Is it newsworthy?**

The most important part of a story—and essential if you want the attention of a media outlet—is this: Is there an angle that makes this “news?” Here are some categories that “news” can fall into:

- Trends - Connect your issue with a trend that everyone is talking about (e.g. heat wave, pop culture, proposed legislation, etc.)
- Time – Everything from an anniversary of a program or organization to an obscure holiday or commemoration (i.e. pollinator week) can be newsworthy
- Program changes or new initiatives (e.g. a big milestone that was achieved, etc.)
- Events – Whether open to the public, or if an important matter that will affect many will be discussed
- Studies - A recently released report with new findings or facts is a great news hook

**What are your goals?**

When working on any story, keep your goals or objectives in mind. Ask yourself: is this story moving the audience in the right direction about my issue? Additionally, if you want your audience to take action, be sure to state what that is.

**How do you want them to feel?**

Think about the feeling or emotion that you are trying to invoke, whether its hope, curiosity or inspiration and build your story development around creating that feeling. When you create emotion, you will likely grab people’s attention and in return, they may just care about your cause.

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<sup>1</sup> If you have any questions or comments on this material, please feel free to Sheila Sarhangi at [ssarhangi@seawebap.org](mailto:ssarhangi@seawebap.org)

**Is the meaning or moral clear?**

Make sure that the story has a moral or a point that people can relate back to their lives, and give them a reason for reading the story in the first place. People don't need more facts and figures; they are looking for ways to create analogies or examples in their own life.

**Who are the people involved?**

Bring your story to life by including people. Is there someone that can be interviewed or highlighted that is passionate about the issue? Or has an individual been involved in your project in a very meaningful way? Seek individuals with their own story that can do the work for you. But take note: be sure to spotlight folks that the audience will trust, identify with or relate to.

**Is there conflict involved?**

Typically, stories have a hero and a villain. Even jokes tend to have a little drama involved. While you don't need to draw a line between good vs. bad, sharing the context of your issue is a key component of storytelling—and can clearly pinpoint your organization or the people involved as the hero.

**Can it be articulated visually?**

Think about how you can support the written story with powerful visuals that make people take notice, such as photos, videos, or even graphics that translate numbers or hard to understand information. Note: When using photos, try to stray from stock images, which tend to lack emotion, but instead use authentic images, with real people.

**References**

Visual Story Lab, a project of Resource Media; CNN iReport; Andy Goodman

**Maui Nui Community Managed Makai Area (CMMA) Learning Network**  
Polanui Hiu, 393 Front Street, Lāhaina, Maui

**Train-the-Trainers Workshop – Strategic Communications Planning**

**Communications Ethics and Best Practices Tip Sheet**

**Attributing quotes and information from meetings, conversations, etc.**

Gaining support from a variety of stakeholders and influence leaders is an essential aspect of effecting change in your community. Demonstrating that support by being able to quote people or have them support you publicly is also key. But to gain – and keep – trust, it's essential to be very clear with everyone that you may want to use any information they share with you to further your cause. During and after conversations, explain you would like to use a quote from them, have them write a letter to the editor, or otherwise support and promote your project. Say this more than once so they are not surprised. It's also a good idea to check in with these individuals a second time before using anything, even if they already said yes, to avoid any surprises.

**Images, logos, clip art, photos, videos**

- Even though it is easy to download and share images easily from online sources, it's important to check on the copyright status of anything you want to use as part of a communications strategy.
- Wherever possible, just use your own images (or a friends').
- Otherwise, look for images that are explicitly labeled as public domain, free, or have a creative commons license (see below for more info).
- In all cases, give correct attribution, or credit, for anything you use (even free stuff).

**Free online resources**

There are many sources of free images, clip art, video and so forth that anyone can use. Wikipedia maintains a list of public domain resources, and there are many other sites as well. [http://en.wikipedia.org/wiki/Wikipedia:Public domain image resources](http://en.wikipedia.org/wiki/Wikipedia:Public_domain_image_resources)

A few more free resources:

- <http://www.freepixels.com/>
- <http://openphoto.net/>
- <http://www.freephoto1.com/>
- <http://www.sxc.hu/>
- <http://www.imageafter.com/>

Beth Kanter's list, edited (bethkanter.org):

- Facebook has [a huge free stock photo archive](http://www.shutterstock.com) for use in Facebook ads from [www.shutterstock.com](http://www.shutterstock.com)

- [Flickr Creative Commons](#) – Flickr is a photo sharing site open to everyone. You can search for “creative commons” copyright licensing, and combine that with key words to find images for your project. (<http://www.flickr.com/creativecommons/> )
- [Morgue File](#) – This collection of photographs were freely contributed by many artists to be used in creative projects. (<http://morguefile.com/> )
- [Wikipedia Public Domain Images](#) – Wikipedia uses public domain images and has organized a collection with information on how the photos can be used and attributed. ([http://en.wikipedia.org/wiki/Wikipedia:Public\\_domain\\_image\\_resources](http://en.wikipedia.org/wiki/Wikipedia:Public_domain_image_resources) )
- [Wyllo](#) – This is a searchable archive of public domain or creative commons licensed photos that bloggers can use. (<http://www.wyllo.com/> )
- [Stock Exchange](#) – image archive of free stock photos (<http://www.sxc.hu/> )
- [Microsoft Office Clip Art Collection](#) – Large collection of photos, illustrations, animations, and clip art. The downside is many are commonly used in PowerPoint presentations, so may not seem unique. (<http://office.microsoft.com/en-us/images> )
- Beths’s [list of free or low cost stock images](#) (<http://list.ly/list/703-free-stock-image-sites> )

### **Legal issues**

Respecting copyright laws protects you and others. The bottom line is that people who create graphics, photographs or other content own that content and deserve to be credited for their work. And it’s the law (<http://www.copyright.gov/fls/fl102.html>).

Fair use principles are a set of best practices developed and followed by journalists and many other professionals to reduce the risk of copyright infringement. You can learn more about it here: <http://www.centerforsocialmedia.org/journalism>

### **Tell the truth**

This may seem obvious, but it bears a moment of reflection because some may see strategic communications, or public relations, or other communication tools, as a ploy (note image at right). The term “greenwashing,” for example, refers to a manipulation of facts and trends to suggest an organization and its products are environmentally friendly, when they are not.

Using strategic communications tools can help you achieve your goals. Crafting messages and targeting audiences is ethical – as long as you avoid duplicity, lies, cover-ups, and so forth.

For an interesting take on applying strategic communication tools from one side of a political spectrum to the other, read George Lakoff. A UC Berkeley linguistics professor (and liberal), Lakoff advocates using every tool available – including framing, targeting, and using “moral” triggers to gain support. Read his advice here: <http://www.theguardian.com/sustainable-business/george-lakoff-green-marketing> and here: [www.georgelakoff.com](http://www.georgelakoff.com)



This image is on the website for a strategic communications consulting firm: [www.cfm-online.com/ethics](http://www.cfm-online.com/ethics)

## ***Elements of a Strategic Communications Plan***

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Determine Goal

Identify and Profile Audience

Develop Messages

Select Communication Channels

Choose Activities and Materials

Establish Partnerships

Implement the Plan

Evaluate and Make Mid-Course Corrections

## Step 1: Determine Goal

To initiate a successful and effective communications effort, start with an assessment of your current organizational goals. Examine what your organization stands for—its mission, values and beliefs. Look closely at who your organization is serving. This process will help narrow and sharpen the focus for your *communication initiative(s)*.

What issue is most important to your organization right now?

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Who is most affected by the issue stated above?

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Who makes decisions about the issue?

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What is the overall goal you want to achieve? (i.e., What change would you be able to observe?) (Be specific.)

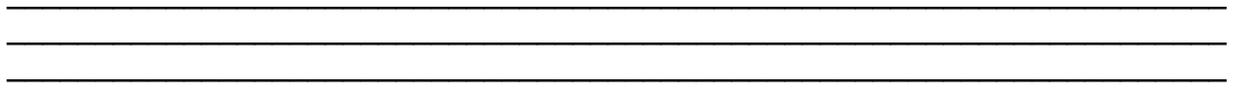
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What tangible outcomes would you like to achieve through a communications effort? i.e., How will you know you are achieving your goals? (Be specific. What would you see, hear, or have in-hand that would let you know you are making progress toward the goal?)



## Step 2: Identify and Profile the Audiences

Once you've identified your key issues, it's time to identify and profile specific audiences to target with a communications initiative.

The reason for taking the time to look this closely at your audiences is that this kind of background information is essential in choosing the most effective ways to communicate with the audience. Madison Avenue has learned this lesson well, now we need to apply some of the same kind of thinking to communicating about your issue.

# Audience Definition Worksheet

Of the audiences listed on the Step 1 worksheet, whose knowledge, attitudes and behavior must be changed in order to meet your goal? (*These groups now become your primary audiences.*)

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Who else is affected if you succeed in your goal? (secondary audience)

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Are there others who can influence primary and secondary audiences? (tertiary audiences) (You may wish to design a communication initiative to reach some of these audiences as well. Or you may see a role for these folks as “allies and partners”.)

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Now you are ready to complete worksheets for each of your audiences identified above. (see next page)





## Step 3: Develop Messages

Your messages are closely tied to your goal and objectives. They deliver important information about the issue and compel the targeted audience to think, feel, or act. They can:

- Show the importance, urgency, or magnitude of the issue
- Show the relevance of the issue
- Put a “face” on the issue
- Be tied to specific audience values, beliefs, or interests of the audience
- Reflect an understanding of what would motivate the audience to think, feel, or act
- Be culturally relevant and sensitive
- Be Memorable

The messages you develop by using the worksheet provided in this section can be used in many ways. First, they are a set of statements that you and your team agree upon as conveying the key information for your initiative. They will not include all the detail and supporting ideas and data that you may use in printed materials or other forms of communication. The messages you develop in the worksheets can become the underlying themes for your materials and activities. You may develop slogans based on them. You may develop sets of talking points that members of your team will use in making presentations. And they easily become the basis for radio and print PSAs, the genesis for posters, and may suggest topics for fact sheets, drop-in articles, and even letters to the editor or newspaper editorials.

Before turning to the Message Development Worksheet, take a few moments to read “Considerations for Message Construction.”

## ***Considerations for Message Construction***

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Both the *channel* (the conduit for sending your message to the chosen target audience) and the *purpose* of communicating environmental information influence message design. Information may be designed to convey new facts, alter attitudes, change behavior, or encourage participation in decision-making. Some of these purposes overlap; often they are progressive. That is, for persuasion to work, the public must first receive information, then understand it, believe it, agree with it, and then act upon it. Regardless of the purpose, messages must be developed with consideration of the desired outcome. Factors that help determine public acceptance include:

- **Clarity**—Messages must clearly convey information to assure the public’s understanding and to limit the chances for misunderstanding or inappropriate action. Clear messages contain as few technical/scientific/bureaucratic terms as possible, and eliminate information that the audience does not need in order to make necessary decisions (such as unnecessarily detailed explanations). Readability tests can help determine the reading level required to understand drafted material and help writers to be conscientious about the selection of words and phrases.
- **Consistency**—In an ideal world there would be specific consensus on the meaning of new findings, and all messages on a particular topic would be consistent. Unfortunately, consistency is sometimes elusive. Experts tend to interpret new data differently, making consensus among government, industry, and public interest groups difficult.
- **Main points**—The main points should be stressed, repeated, and never hidden within less strategically important information.
- **Tone and appeal**—A message should be reassuring, alarming, challenging, or straightforward, depending upon the desired impact and the target audience. Messages should also be truthful, honest and as complete as possible.
- **Credibility**—The spokesperson and source of the information should be believable and trustworthy.
- **Public need**—For a message to break through the “information clutter” of society, messages should be based on what the target audience perceives as most important to them, what they want to know, and not what is most important or most interesting to the originating agency.

Prior to final production, messages should be pretested with the target audiences (and in some cases with channel “gatekeepers”) to assure public understanding and other intended responses.

Source: *Making Health Communication Programs Work: A Planner's Guide*, Office of Cancer Communications, National Cancer Institute, National Institutes of Health (1992).



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## Step 4: Select Communication Channels

Communications channels carry the messages to the target audiences. Channels take many forms and there is an infinite list of possibilities. Answering some key questions will aid you in identifying the most effective channels for reaching your audiences.

### Sample Channels

- Television stations
- Radio stations
- Newspapers
- Web sites
- Community centers
- Street festivals
- Laundromats
- City government offices (e.g. Division of Motor Vehicles)
- Malls
- Parks
- Schools, colleges, vocational and language training centers
- Libraries
- Recreation centers (e.g. basketball courts or soccer fields)
- Community non-profit offices
- Transportation depots/stations
- Supermarkets
- Fast food restaurants
- Literature Racks

## Channel Worksheet *(one worksheet for each audience)*

*Note: Use the work you did in Step 2 to help you with these worksheets.*

Audience:

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Where or from whom does this audience get its information? Who do they find credible?

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Where does this audience spend most of its time? Where are they most likely to give you their attention?

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Complete list of channels your team wants to use to reach this audience:

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## Step 5: Choose Activities and Materials

What are the activities, events, and/or materials—to be used in your selected channels—that will most effectively carry your message to the intended audiences? In choosing these, you should consider:

- Appropriateness to audience, goal, and message
- Relevance to desired outcomes
- Timing
- Costs/Resources
- Climate of community toward the issue/activity
- Cultural appropriateness (including language)
- Environment—geographic considerations

### ***Sample Activities***

News conferences  
Editorial board meetings at newspapers  
Radio talk or call-in shows  
A benefit race  
Parades  
Web links  
Conferences  
One-on-one meetings  
Open houses  
Speeches  
Hotlines  
Listserves  
Information Fair

### ***Materials to Support Activities***

News releases  
Fliers and brochures  
Opinion editorials (op-eds)  
Letters to the editor  
Posters  
Public service announcements (PSAs)  
Bookmarks  
Video presentations  
Web pages  
A float in a parade  
Buttons, pins, and ribbons  
Promotional items and giveaways



# ***HARNESSING THE POWER OF PARTNERSHIPS***

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## ***Allies and Partners***

Groups, organizations, or businesses may exist that would aid you in reaching your goal by providing funds, expertise or other resources toward your communications

The prospect of developing partnerships with area businesses and local organizations may seem overwhelming if you haven't had much experience in working with the private sector. However, there are some practical steps you can follow that will focus your energies and resources where they will be most effective.

## **Determine Your Needs**

Before you ask for help, it's important to identify what you need most. Make a "Wish List" and include areas like equipment (computers, vehicles, or supplies); services; educational activities and materials; and specific products that can be donated. This list will help set your priorities and guide who you need to contact.

## **Identify Potential Partners**

There may be hundreds of organizations to approach in your community—where do you start? Let your fingers do the walking and start with the Yellow Pages. By using your Wish List to identify categories of need, you can narrow the types of organizations that can help you. Don't limit yourself at this stage and try to be imaginative. For instance, a local pizza parlor may not have an obvious link, but if it is a popular hang-out for high school students, the restaurant might host a pizza party and allow you to hand out information on ORVs.

Other sources for potential partners are your Chamber of Commerce directory, general corporate directories, and personal contacts, including your board of directors or existing coalitions. For national contacts as well as local, there are several national directories that are available at your local library. The Corporate Giving Directory, which is updated annually, is an excellent choice. Don't forget to monitor the local media. Who sponsored that nonprofit ball and where was it held? What company bought the T-shirts for the annual 10K Run to support environmental research? Also, if you have a good relationship with other nonprofits or agencies, they may share their giving list.

## **Prioritize Your Contacts**

When you have a list of possible contacts, begin making your partnership circle. This circle will help you further identify your most important contacts so you can prioritize your efforts. You've chosen possible partners by category—now look for *personal contacts*. Think of dropping a pebble in the water and watching the ripples spread out. By putting organizations where you already have contacts in the center, you will anchor your effort as you move further and further out.

Start with organizations that have helped in the past—they will be the very center of your circle. Then talk to employees, your board of directors, or coalition members. Who do they know? You may discover that someone on staff went to school with the president of a local bank. Put organizations where you have close personal contacts on the next "wave" of your circle. After examining personal contacts, look for those organizations that would make "perfect partners," i.e., organizations that have supported environmental issues in the past. Keep going until you get to the very outer layer, which would be organizations where you have no contacts at all and no apparent links. Now you have prioritized your outreach list!

The final step before preparing your proposals is finding the correct contact. You may have this information if you've used an up-to-date directory or have a personal contact, but if you're not sure, make a phone call. Ask to whom you would send a partnership proposal; be sure to get the person's name, title, full address, and phone number. And finally, don't overlook the importance of using the Internet to research target organizations.

### **Make Your Proposal Strategic**

Companies have a giving strategy, so your proposal should be strategic too. A fundraiser for a major national nonprofit once said, "There is no corporate philanthropy—they all give for a reason." Most organizations give strategically, meaning they give in an area(s) where they have an interest, want to influence someone or something, or stand to gain something—employees, customers, and the community influence those decisions as well. We all know that there can be tough competition for nonprofit support, and that decisions are sometimes made on small details. Look at your partnership circle and carefully look for connections. Has a city councilperson recently dealt with an environmental issue? Look for logical allies and mutual goals and put that information in your proposal.

Make the proposal "mutually beneficial." Just as you have asked for something, be prepared to offer something in return. Try to at least reward the organization with positive community exposure and recognition for its efforts.

Use your best judgment on the proposal. If you know someone, a letter may suffice. If you're sending a proposal to a large company, you may want to send a letter, an information kit, and a recent newspaper article on what your organization is doing in the community. Always demonstrate the importance of the issue, the importance of the program in the community, specifically how the organization can help strengthen your efforts and how the organization will benefit from its participation.

### **Face-to-Face Follow-up**

About a week after sending your proposal, call the contact to verify that he/she received the information. At this point, introduce yourself (if you don't know the contact already) and offer to answer questions or send more information. Ask when would be a good time to call back to schedule an appointment; mark the date and call promptly at that time.

The best way to "sell" the proposal is face-to-face where you can talk about the campaign, its goals, and its accomplishments. It's important to be realistic. Smaller businesses may not have extra funds to support community programs, but may be able to provide in-kind support. They may be willing to include information on ORVs in their mailings to the community, fliers to circulate to their employees, in their stores, etc. If you've done your homework, you will be able to request help that the company will gladly agree to provide.

### **Make Your Community Partners Part of Your Team**

Don't ask for something and then never contact the organization again! Keep a database of all donors (even listing those who said they might give in the future) and recognize them periodically with a personal note or newsletter. Keep them informed on what's happening with ORVs and other environmental issues in the community and continually offer opportunities for participation, including volunteering. Also, offer a chance for feedback so you can establish a two-way dialogue with your partners. A town meeting, an online seminar, or a presentation, are all ways to share information with your partners. Make them team members and they will continue to support you for years to come!

## Step 7: Implement the Plan

*There are many tools for organizing yourself around time, dollars, and staff needed to implement an initiative. One approach is given here as an example. Of course you should feel free to use your own tried and true management tools.*

Use the following steps to determine time, budget and staffing needs:

1. List all activities
2. Under each activity, outline the steps, in order, that will lead to its completion
3. Assign a budget estimate to each step
4. Assign a staffing needs estimate to each step
5. Working backwards from the activity completion point, assign a date for each step in the activity.

You can plot your dates on calendar pages if you'd like, or you can organize them in another timeline such as a Gantt chart (date/timeline runs horizontally across page; tasks are listed in chronological order down left-hand side. A line extends across the page from each task, showing the date work begins and ends on that task or subtask).

## Sample Timeline Planning Sheet

### **Activity: Place print PSAs in up to 25 periodicals, newsletters, or bulletins**

- [Preliminary Work] Design camera-ready PSA “slicks” ;10 person hours.
- [Weeks 1 & 2] Identify list of potential placement opportunities and get names and addresses of public service director or advertising manager for each publication; (local phone charges); 4-6 person hours.
- [Week 1] Draft/review/refine cover letter to director/manager; \$0.00; 2 person hours.
- [Week 2] Print letters; \$0.50 (paper); 1 person hour.
- [Week 2] Acquire flat envelopes and blank labels for mailing; \$10.00; 1 person hour.
- [Week 2] Create labels for mailing; \$0.00; 3-4 person hours.
- [Week 2] Assemble mailing; \$0.00; 2-3 person hours.
- [Week 2] Mail print PSAs; \$13.75 (.55x25); .25 person hour.
- [Week 3] Begin follow-up calls to PSA directors to encourage placement; (local calls); 6-8 hours (could be done by 2 persons;).
- [Weeks 3-10] Monitor PSA placement; \$5.00 to purchase papers; 3-4 person hours.
- [Week 10] Write report about initiative, its outcomes, midcourse corrections, and things you would do differently next time; \$2.00 paper & repro; 4-6 person hours.
- [Week 10 or 11] Circulate to appropriate members of your organization; \$0.00; 1-2 person. hours

Total direct costs: \$31.25

Labor: 28-38 person hours (over 4-10 weeks' time after acquiring PSAs)

## Step 8: Evaluate and Make Mid-Course Corrections

- Specify times to take stock of progress in completing communications plan.
- Determine strengths and weaknesses.
- Identify obstacles.
- Create and implement new approaches for success.
- Consult with communications technical assistance advisors.

# Campaign Planning Worksheet

*Consider the following questions when planning a comprehensive communications campaign:*

1. What are your short-term and long-term campaign objectives?
2. What is your timeline for completion of the campaign?
3. Who are your target audiences?
4. What are the key communications messages (no more than three, please)?
5. What are your staff and financial resources?
6. What materials and activities will best disseminate these messages?
7. What media have you targeted?
8. What specific roles have you identified for your spokespeople?
9. What role will consortium members, corporate partners, and staff play?
10. How will you evaluate your campaign?