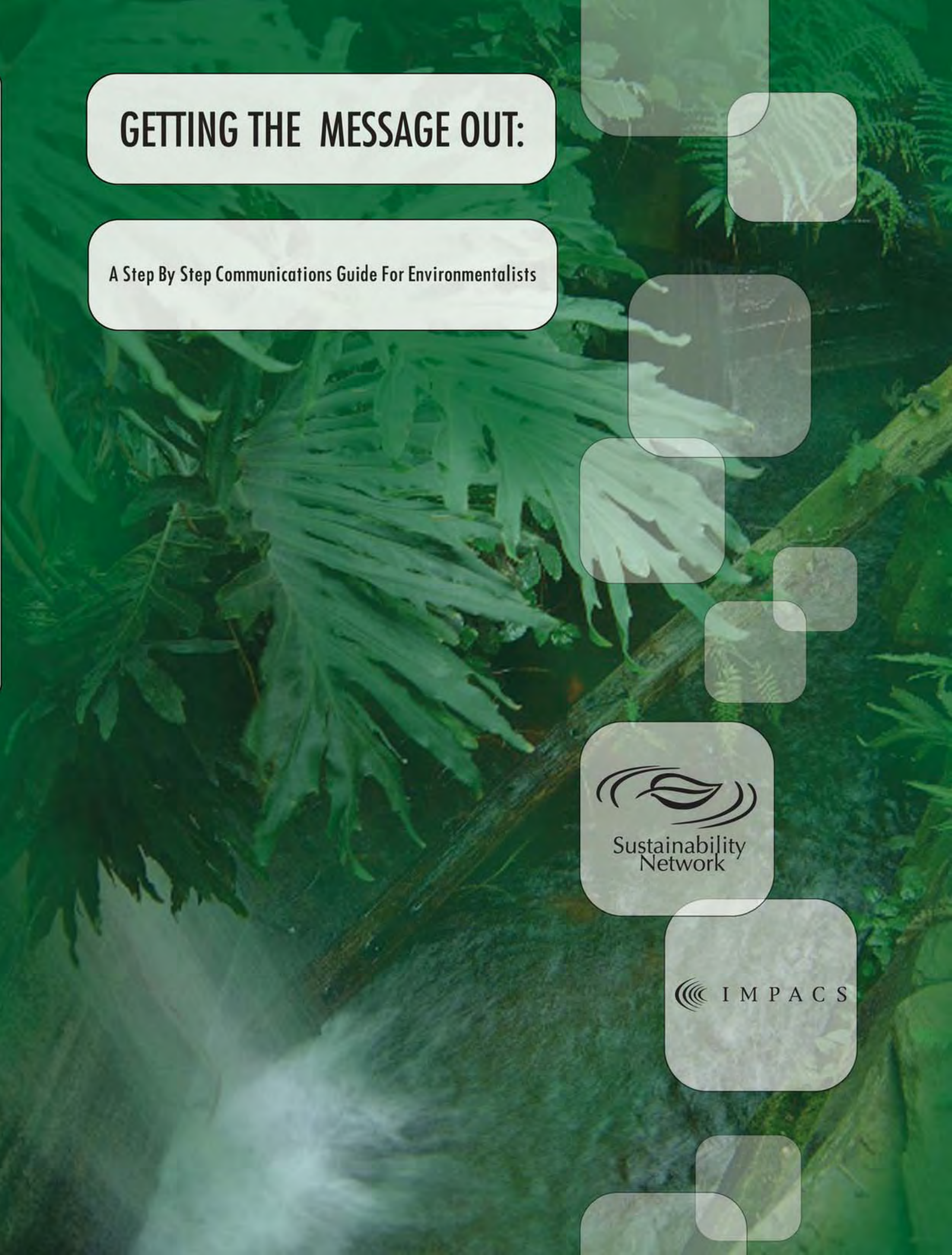

GETTING THE MESSAGE OUT:

A Step By Step Communications Guide For Environmentalists

Sustainability Network

IMPACS

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PREFACE

This handbook is a joint project of the Sustainability Network and IMPACS: the Institute for Media, Policy and Civil Society. It is designed to help environmental groups focus their communication efforts. The work that environmental groups do is difficult, time-consuming and often hard to communicate. Groups struggle with limited resources, competition for media attention and publics pre-occupied with important and pressing issues of the economy, health, social welfare and education.

To succeed in this climate, environmental groups must focus with laser-like intensity on getting their messages out. But to whom? And how? Few environmental groups have the kind of internal resources to reach the general public. The challenge then is to develop the right messages, have those messages delivered by the right messenger, to the right audiences, time after time. Figuring out what those messages are, who should deliver them and identifying the right audience is the focus of this handbook.

Through exercises, worksheets and basic communications theory, this handbook will help any environmental group bring that focus to its communication efforts. We hope this handbook will help environmental groups and environmentalists tell the story about the critical work they do, in preserving our natural heritage. It's an important story, and one that should be shared.

This handbook is the brainchild of Paul Bubelis, Executive Director of the Sustainability Network, whose commitment to providing support for environmental groups drove this project. This handbook is based, in part, on a number of communication skills workshops that IMPACS has delivered to hundreds of not-for-profits over the past four years. The lessons learned in those workshops, and the feedback from participants have provided many of the examples included here.

Donna Barker, founder of IMPACS' training department, wrote much of the original content that formed this handbook. IMPACS Strategic Counsel Amanda Gibbs provided additional material on writing for new media, and Communications Centre Director Catherine Ludgate provided some editorial assistance. This material was woven together with additional content authored by Andrea Cole of Cole Communications, and under her guiding editorial hand, this project became a labour of love. Shehrina Tabassum of the Sustainability Network copy edited the final product and coordinated production.

The Sustainability Network works with environmental non-profits to make them more effective and efficient. By improving management and leadership skills and fostering organizational development, the Network helps to strengthen the environmental community. The Network is about sustaining the organizations that work on sustainability. To learn more about the Sustainability Network, visit http://sustain.web.ca.

IMPACS' mission is to turn up the volume on civil society and to strengthen communications between not-for-profit organizations, government and the media, both in Canada and internationally. IMPACS is Canada's first and only not-for-profit communications skills, services and training organization committed exclusively to increasing the profile of Canadian not-for-profits. To learn more about IMPACS, please visit http://www.impacs.org.

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PART I
Focus on Strategic Planning

1. Planning for Communication Success

A Strategic Approach

Environmental organizations are in the business of encouraging change and don't need to be sold on the value of effective communication. But – as do all organizations seeking to alter attitudes and behaviours – those aiming to create action to protect the environment face an array of challenges. How to communicate issues that many people view as distant from their day–to–day concerns? How to give immediacy to issues that involve longer-term impacts? How to break through the sheer weight of information that people receive on a daily basis? And how to achieve lasting change given the constraint of limited resources, both human and financial?

Part of the answer lies in creating a strong strategic context for your communications – which is the focus of this handbook. A "strategic context" means, in part, that your communications function is fully integrated into your organization's fundamental planning processes so that consideration for how, when and to whom you are going communicate – and why – is incorporated from the start, that is, as your programs are being developed.

> In 1993 the U.S. Agency for International Development (USAID) launched GreenCom[1], an Environmental Education and Communications Project. Its mission: "change human practices to improve the environment." In developing their approach they recognized that effective environmental communications incorporate four different communication disciplines:
>
> - Social Marketing – which applies traditional marketing techniques to encourage behaviour modification.
> - Public Education – which focuses on creating knowledge of issues and offering suggestions for how to affect change.
> - Communication – which draws on social marketing theories but which also encompasses media work.
> - Public Participation – which engages citizens in the decision-making and solution-building processes.

How might this differ from your current approach? It might, for example, influence your research agenda so that you elect to focus on that aspect of the issue that has the broadest public interest or implications. It might mean simply that you ensure your reports are written from a layperson's rather than an academic's perspective to facilitate broader dissemination. It might mean that you don't engage in a new opportunity that – upon close examination – won't help you to move your fundamental goals forward as effectively as another approach. It also means that your communication plans are built on your fundamental goals and objectives, ensuring that your communication efforts are always in service of advancing your mission.

Strategic communication also incorporates an understanding of the cycle involved in taking an issue from the background to the foreground, from the back pages to the front pages, and of how public opinion is formed, although as is discussed below, there is no one simple formula. Finally, being strategic means giving full consideration to how communication – in *all* its forms – can help your organization to move the public agenda and public opinion in favour of the responses you seek on your issues. Here are two fundamental steps that you can undertake to move your communications forward.

Step One – Involve Your Organization

Building Your Communications Team

As a first step you may want to build a working group or communications team. Your staff, your board members and your volunteers – or, if you're involved in a collaborative effort, the coalition of groups you're working with on the issue – each have a unique perspective, as well as valuable expertise, resources and insights. So involve them in the planning process. The plans your organization develops will be immeasurably enriched if this is taken into account. The person who answers your phones, for example, might have the best insight into the kinds of public enquiries you receive; your program heads, the most comprehensive handle on the issue; your board members, a range of useful contacts. Draw on these assets. Depending on the issue at hand, you may also want to involve an outside strategist to facilitate meetings and to keep your planning work moving.

This communications working group will help you to develop a consistent approach and ensure that you have people in place to respond to opportunities to promote your issues and your organization. As this team works to promote your issues and programs, it will develop valuable skills and expertise. It will also build relationships with journalists and other members of the media that will serve your organization well over time.

Understanding the Context for Public Opinion and Behaviour

Researchers of all stripes – from sociologists to corporate marketers – have long sought the answer to what influences people's behaviour. Naturally, a conclusive formula would greatly simplify the communication process; however, people cannot be that neatly explained. What we do know is that public opinion is influenced by a combination of factors, including media exposure and sources closer to home.

1. The media set the public agenda – and provide the frame. Myriad studies over the past 30 years have found that the media set the public agenda. The prominence they give to certain issues affects our perception of the relative importance of those issues. In addition, by virtue of both what is and what isn't included in their stories, the media also affect *how* we think about the issues. (The jury, however, is still out on whether the media provides us with our actual opinion on the issues!)

2. There is a cycle through which issues move to prominence. According to the authors of *Strategic Communications for Nonprofits*[2], tracking studies have shown that important issues typically move through a seven–stage cycle – starting small and moving in fairly predictable stages to prominence (and subsequently back to obscurity), with public opinion largely following the same pattern. Here's a closer look at the cycle they describe.

   As might be anticipated, discussion of new issues typically begins within an industry – appearing on the pages of in–house publications, in industry speeches and papers and in other organizational forums. In stage two, issue coverage moves into the industry's nationally circulated professional journals, specialty or trade books, and commercial newsletters. Then, beat reporters that follow the trade publications pick up the scent and the issue begins to appear in various sections of the daily papers. As the issue begins to generate critical mass, editorial writers start to take up aspects of the issue. From there an issue will move to the front pages of the daily paper. Then the network news – which typically takes its cue from the front pages of the dailies – starts to provide coverage. Finally, once the issue has generated thorough coverage by a range of influential media, the issue may enter pop culture – for example, showing up in TV movies, soap operas, feature films and other TV events.

3. While the media "set the agenda", sources closer to home may have a greater influence on actual attitudes and opinions. Citing the "circles of communication effectiveness" model developed by Vince Breglio, a Republican research analyst and public opinion expert, the authors of *Strategic Communications for Nonprofits* also posit that while the media has a great deal of influence, people seek validation for their opinions closer to home[3]. According to Breglio's model, people seek validation first from their nuclear and extended families, then from close friends and associates, and finally from those in positions of trust (e.g. clergy and doctors), prior to referencing the mass media. Breglio also differentiates among the media: he views newspapers, direct mail and the Internet as being more influential than radio, TV or cable.

4. There are four stages of engagement. An important strand of research – see the box on this page – posits that there are four stages to engagement. While this model remains key in describing the general progression from inaction to action, in their contribution to the *GreenCOM Handbook for International Practitioners*, authors Martha Monroe, Brian Day and Mona Grier also point out that "research in the field of environmental education and in commercial marketing have shown that there is no cause–and–effect progression from knowledge to attitude to behaviour as educators have long believed."[5,6]

The Four Stages of Engagement[4]

One strand of research identifies four distinct stages to engagement – and posits that people *must* go through each of these stages before they'll take action.

This means your messages must match where your target audience is currently "at" on your issue. There's no point in bombarding them with information if they're not yet paying attention, or in trying to persuade an audience to act when they have not yet taken a position.

As such, your communications campaign must aim to accelerate your audience through one or more of these stages:

Stage 1: Awareness
(no engagement)

- People need a reason to care and to feel your issue is relevant to them.
- Your campaign introduces people to the issue and aims to put it on the public agenda.

⇩⇩⇩

What this means is that while there must be an impetus (awareness, knowledge and attitudes) for behaviour, organizations should also be prepared for the fact that Mary might be ready to act based on little knowledge (basic awareness) while John might not act even when faced with all of the facts.

Also in the GreenCom Handbook, in the chapter called "Thinking about Behavior", authors Monroe and Orlando Hernandez make clear that the reasons for this are as complex as the actors (and the non–actors)[7]. Perhaps, for example, saving energy accords with Mary's fundamental values (which might be concern for the environment or perhaps simply economic) so she is ready to act without full knowledge. And maybe, because someone she trusts has mediated the biodiversity issue for her, she is ready to contribute to a campaign without fully understanding the concept. Meanwhile John might face barriers to action on a particular issue despite his knowledge – for example, he may feel he doesn't have time to sort recyclables or might not understand the recycling rules.

⇩⇩⇩

Stage 2: Attentiveness
(low engagement)

- People are ready to become informed – or more knowledgeable about your issue.
- Your campaign gets people to listen to and believe your information.

⇩⇩⇩

Stage 3: Judgment
(moderate engagement)

- People must be persuaded to support your position on the issue.
- Your campaign speaks to their values and emotions.

⇩⇩⇩

Stage 4: Action (high engagement)

- People must be motivated to act in support of your position.
- Your campaign motivates and supports political and/or consumer actions.

Finally, as Monroe *et al*. point out – and this is key for any environmental campaign – research shows that people who take environmental action not only have a level of awareness about the issue, they have a clear understanding of *how* to affect change.[8] All of these issues should inform your thinking as you develop the programs, communications and campaigns that will move the public to act on your issue.

[1] GreenCOM is the Environmental Education and Communication Project which was launched by the United States Agency for International Development (USAID) in 1993 to govern its approach to communicating on environmental issues.
[2] Kathy Bonk, Henry Griggs, and Emily Tynes, *The Jossey Bass Guide to Strategic Communications for Nonprofits* (San Francisco: Jossey-Bass Publishers, 1999), 14-17.
[3] Ibid, 13-14.
[4] GreenCOM is the Environmental Education and Communication Project which was launched by the United States Agency for International Development (USAID) in 1993 to govern its approach to communicating on environmental issues.
[5] Hines, J.M., H.R. Hungerford and A.N. Tomera (1986-1987)."Analysis and synthesis of research on responsible environmental behaviour: A meta analysis." *The Journal of Environmental Education* (18) 2, 1-8.
[6] Martha C. Monroe, Brian A. Day, and Mona Grieser, "GreenCOM Weaves Four Strands," in *Environmental Education & Communication for a Sustainable World: Handbook for International Practitioners*, eds. Brian A. Day and Martha C. Monroe, (Washington: Academy for Educational Development, 2000), 3.
[7] Orlando Hernandez and Martha C. Monroe, "Thinking about Behavior" in *Environmental Education & Communication for a Sustainable World: Handbook for International Practitioners*, eds. Brian A. Day and Martha C. Monroe, (Washington: Academy for Educational Development, 2000), 7-15.
[8] Ibid, 5

2. Building the Road Map

The Strategic Communications Plan

The starting point for every successful communications program is the strategic planning process. This process ensures that you have a clear road map and a destination for your communication efforts. It will help you to clarify your priorities, provide you with a touchstone to ensure you're not pulled in too many directions when new opportunities arise, and assist you to maximize those all–too–often limited resources.

An effective plan should also help you integrate *all* of your organization's work on a particular issue. This includes not only your media activities, but also your government relations work, grassroots organizing, fundraising efforts, and your communications with members.

♈♈♈

This chapter takes a step–by–step look at the process of developing a strategic communications plan, following the fairly typical format shown in the box on this page – and with the caveat that the planning process is not always strictly linear. (As you develop your strategies, for example, you may wish to further refine your messages. Or, further research into who your audiences are may provoke some refining of your objectives.)

> **The Communications Plan**
>
> A typical communications plan includes a preliminary introduction or overview, followed by these key sections – which are the focus of this chapter of the handbook:
>
> - Situation Analysis
>   - Organizational Background
>   - External Environment
> - Goals and Objectives *(of the Organization and the Program or Campaign)*
> - Target Audiences
> - Key Messages
> - Communication Objectives
> - Communication Strategies and Tactics
> - Timing and Timelines
> - Spokespeople

You'll quickly note that the focus is on raising the *kinds* of questions that need to be asked in tackling each component of the plan. (These questions are summarized in the worksheet at the end of the chapter. See – Worksheet #1 – Developing a Communication Plan – page 30.)

This questioning and thinking–through process is vitally important for organizations working to achieve change on environmental issues. Few of us still believe that public awareness alone will lead to positive change, recognizing that it is more often the case that concrete change only comes about when those with power – whether they are political and/or corporate leaders, consumers or donors – are motivated by clear forces to act.

Your challenge, as you develop your own plans, is to define what concrete actions your organization can take in order to create this clear outside force. Here's a look at the process – beginning with the situation analysis.

Step One – Start with the Facts

The Situation Analysis

A comprehensive analysis – including a detailed examination of both your organization and the external environment – will provide a cornerstone for both your current and future plans, so it's worth spending some time on this step in the process. The more you know about the existing landscape – that is, the key players, the public's current perceptions, the opportunities, and the threats to your success – the sharper will be the goals and objectives that you ultimately decide will advance your mission. In addition, a well–developed situation analysis will provide you with the arsenal of information to inform your messages, strategies and tactics.

Finally, as you work through your situation analysis, you may identify some issues that you'll need to address in greater depth. (How do you *want* to be positioned? Do you *want* to work with other groups? How can you find out *more* about what the public thinks?) Here's a closer look.

A. Your Organization's Background

Whether your strategy is for your organization as a whole, or you're embarking on a new program or campaign, it's essential to look at how your organization is currently positioned. Your review should encompass a look at your growth and evolution, detailing your assets and strengths. It should also cover the challenges your organization may face and enumerate your potential weaknesses. Your particular issue and focus may dictate some of the questions you need to ask; however, this part of your situation analysis will likely involve answering the following kinds of questions:

1. What functions does your organization serve? What services do you provide?

    - Basically, this is your mission statement…
        - *What does your organization do, for whom, how and why?*

2. What is your organization's role and impact in the community?

    - What benefits are provided by your programs and services – and for whom?
        - *Where do you fit compared to other organizations working in this area?*

3. What are your performance indicators? What have been your key successes?

    - How have you grown – for example, in resources, numbers of programs, issue areas, etc?
    - What have been some of your key achievements – for example, successful programs, policies changed, etc?
        - *What factors illustrate that you are the right organization to address this issue?*

4. What might be the *challenges* you'll face in taking on this issue?

    - Does your organization have, for example, a low public profile, limited resources, or only local reach?
        - *How might you address these challenges?*

B. The External / Public Environment

Your aim, as you turn now to the external or public environment, is to develop as clear a picture as possible of the current lay of the land. You'll want to consider not only the *facts*, but also how the issues and your organization are *perceived,* and how you *want* them to be understood.

Vital to your review, too, is careful consideration of all the actors (the decision–makers, the media, your potential allies, your competition and opponents), all of whom may be delivering messages that affect public opinion. Here are some key questions:[1]

1. What is the issue? The information you gather here is key to making your case:

   - Why is this issue important? What are its impacts? Who does it affect?
   - What are the pertinent historical and current facts – and statistics, if possible?
     - *What are the repercussions of not addressing this issue, now?*

2. How is the media treating this issue? As described in chapter one, the media is shaping how decision–makers and the public currently view your issue.

   - How much coverage is your issue receiving?
   - Which media (newspapers, radio, television, consumer or trade magazines) are covering the issue?
   - What context is being provided? What aspects of the issue are being covered?
   - What are the gaps and inaccuracies in the coverage?
     - *How do you need to shape the media's coverage?*

   (Note: This topic is further explored in Chapter 3 Researching Public Opinion – see Media Trend Analysis – starting on page 51.)

3. What is the public's current perception of the issue?

   - Is your issue already on the public's radar screen or will it be new to most people?

- Is it well understood or are there misperceptions?
- Is it generating debate – on the ground, in the media, or in political circles?
- Have there been any recent public opinion surveys or studies – and can you access them?
  - *Is more research needed to understand the public's opinions and attitudes?*

4. What is the public's *perception* of your organization and its approach?

- Is your organization well known – and is it known for its work on this issue?
- Has your organization done any notable lobbying – in person or through correspondence?
- How are you generally perceived – as "grassroots," as mainstream, as credible, as radical...?
- How has your organization been positioned within the media – positively, negatively, with in–depth or superficial coverage, or not at all?
  - *How do you want to be perceived by the public – and others?*

5. Who are the key players?

- Who (or what) is driving this issue – the key decision–makers, stakeholders, etc?
  - *Do you need to find out more about these individuals and organizations?*

6. Who are your allies...and potential allies?

- Who is publicly supportive – or could be supportive of your organization's position?
- Does this issue directly affect particular people – and do they have representation?
  - *Do you want to collaborate with any of these organizations?*

7. Who is your competition?

- Who else is delivering similar messages or programs – and what are they saying?
- How well do their messages accord with the kinds of messages you might deliver?
  - *What are their strengths and weaknesses – and how are you different/better?*

8. Who are your current and potential opponents?

- Who is publicly opposed to your position – and what impacts are their messages having?
- Could your work in this area cause new opponents to surface?
- What are the strengths and weaknesses of each opponent you have identified?
  - *What is needed to counter their arguments and efforts?*

Step Two – Define Success

Your Overarching Goals and Objectives, Plus Your Communication Objectives

Based on your now clarified view of the current landscape, you're ready to define, refine or simply bring forward the goals and objectives you have already – and to delineate the communication objectives that will form the basis of this particular communications plan.

As described in chapter one, ensuring that your communications plans are based on your organization's overarching goals and objectives will make certain that your communications efforts are properly directed toward helping your organization meet its *fundamental* aims.

Every other element of your initiative – from identifying your communication objectives to determining your message delivery vehicles and timing – will then flow from this clear definition of what it is that you aim to achieve. In other words, what constitutes success?

A. Your Goals Describe Your Ultimate Destination

Written as simple, almost mission–like statements, goals define the ultimate *outcomes* you want to achieve on your issue. These outcomes may be very specific (for example, to stop the Acme development) or they may describe an ideal state; that is, something that can never truly be achieved but that represents your real desire (for example, "zero health risks" or "no emissions").

Your goal statements should also include a sense of where your action is focused, for example, whether you're aiming to influence government policy, to change a corporate practice, or to cause a change in the public's behaviour. And, finally your goals should be governed by a deadline – whether it is a broad time period (over the next five years) or a specific date (by August 15).

Here are some questions that should assist you to define your overall goals. There is no limit to the number of goals your organization may develop; however, you may find you

> **A Few Key Terms Defined:**
>
> Goals, objectives, strategies, tactics…here are a few key definitions:
>
> - A Goal is a broad statement that describes the *ultimate impact* (zero health risks, clean water, abundant green spaces) you want to achieve and the area of focus (by compelling the government to act, building public pressure, eliminating Bill C-10) over a defined (potentially arbitrary) period of time.
> - An Objective is a specific statement that defines the intermediate steps and more *immediate outcomes* you need to achieve to meet each goal. These should be concrete, time-based and measurable.
> - A Communication Objective is again a specific statement; this time addressing the *communication outcomes* that will help you reach each objective.
> - A Strategy describes *how* you will achieve the communication objectives you have defined.
> - A Tactic details *what* you will do – that is, the *activities* involved in achieving each strategy.
>
> For example: In addressing climate change:
>
> - Goal: to achieve clean air by pressuring governments to address the issue and to pass appropriate legislation.
> - Objective: to pressure the Minister of the Environment to ratify Bill C-10 by December.
> - Communication Objective: to gain the support of five key MPs by March.
> - Strategy: to inform the Minister of the Environment, each key MP and bureaucrat of our position by January.
> - Tactics: develop a briefing package, arrange meetings with key politicians.

need to establish priorities to ensure that you can dedicate the resources that will be required to achieve meaningful results.

Note! Achieving media coverage is not an overarching goal or objective. Communications work of any kind is a tactic – in other words, it is a means to achieving the real goals and objectives of your organization, not an end goal itself.

1. What is the ultimate purpose of your program/campaign/initiative?

   - What situation do you want to change? What problem do you want to solve?
   - What is the ideal state? How will the world be a better place once you achieve your goal?

2. Based on this purpose where, broadly, do you need to focus your efforts?

   - Is political action required?
   - Is social action/change needed?
   - Is change/action required by industry?

3. What is the projected timeframe for achieving your goals?

   - By what specific date (by August 15) or within what global time period (the next five years)?

4. And consider too, how do you want your organization to be positioned through this effort?

   - How do you want people to think about your organization?
   - How do you want your programs and/or issues to be perceived?

B. Your Objectives Describe Where You Need to Focus Now

Objectives define the shorter-term or more immediate *outcomes* that, if achieved, will help you meet each of your stated goals. For example, if one of your goals is to achieve action on climate change by encouraging consumers to institute energy saving practices, an objective might be to obtain a pledge from 5000 homeowners that they will lower their thermostats this year. In other words, your objectives identify immediate and tangible results that help you reach your larger goal.

To be effective, your objectives should be concrete and measurable. And again the focus is on describing *outcomes*. You will define the specific *methods* you'll use and the activities involved in reaching these objectives when you're ready to build your strategies and tactics.

Make Your Objectives SMART

- Specific – Ensure each is a clearly defined statement.
- Measurable – Use numbers where logical.
- Achievable – It's important to stretch but also to be realistic.
- Relevant – They should be directed at achieving your overarching goals.
- Time Specific – Set deadlines!

1. What smaller outcomes or "mini–goals" would help you achieve your overall objective? Think about the sphere you need to focus on and the specific outcome that is required. For example:

   - What political outcome is required?
     - *Does it require the Minister of the Environment to introduce a new Bill into the Legislature within the next three years, or to immediately impose a moratorium on a specific industrial activity?*
   - What social change/public outcome needed?
     - *Do people need to choose to buy recycled products, to decide not purchase SUVs, to lower their thermostats? Do you need to raise $10,000 dollars, to get 100 people to sign up to a new program, or to generate 50 new members?*
   - What industrial change/outcome must be achieved?
     - *Does a corporation (or corporations) need to change a business practice, activity or plan?*

2. What is the projected timeframe for achieving your objectives?

   - That is, within how many months/years or by what date?

3. How will you measure your success in reaching each objective?

- How will you know that you have achieved success?
- What will your benchmarks be?
  - *For example, do you want 5000 homeowners to pledge to lower their thermostats this year? To identify five corporate leaders who will work with your organization in pressuring corporations to adopt energy efficiency?*

C. Now the Focus is on Your Communication Objectives

Based on your overarching goals and your more specific objectives, you're ready to establish the concrete communication objectives that will help you to move your audience forward.

Through your communications, you will be aiming to affect what your audiences know (building basic awareness or greater knowledge), what they think or feel (their current attitudes), and ultimately what they are doing (their actions or behaviour) around your issue. Again, these objectives should be outcomes–oriented, as well as concrete and measurable (i.e., "SMART"). Consider these questions:

1. For each campaign/program objective, determine what the communication outcome you aim to achieve is.

- Are you aiming to affect what your audiences know?
  - *At this stage, do you need to get your issue on the public agenda or increase public awareness about your issue?*
  - *Do you need to reach and inform key decision–makers of your issue and position – such as politicians, business leaders, and others?*
  - *Do you need to build the media's understanding of your issue?*
- Are you aiming to affect what they think or feel?
  - *Do you need to create, change or reinforce an attitude or opinion?*
- At this stage, what do you want them to do? What is the call to action?
  - *Do you want this audience to change a behaviour?*
  - *Do you want this audience to take a specific action?*

2. How will you measure success?

- What will your benchmarks be?
  - *For example: do you want to drive 18,000 people to your website over the next six months, receive 1,500 requests for your Energy Tips brochure by Christmas, generate 1,000 faxed letters to a specific decision–maker this year; add 100 new, active volunteers to a local stream recovery initiative by September; or to illustrate public support by ensuring that at least 20 of your organization's members call into a local talk radio show on August 15 to support your position during a critical debate?*

Step Three – Identify Who You Need to Reach

Your Target Audiences

With your overarching goals and objectives, and your communication objectives in place, you're ready to identify *exactly* whom you need to reach – and this is critical. Not only is aiming to reach the entire population (the "general public") well beyond *any* organization's means, usually only *specific* segments of the public can or will make a difference on your issue. (Take a look at the sidebar starting on this page.)

This section includes a preliminary discussion of the kinds of information you need to develop. You may find, however, that targeting your audiences requires some additional research.

There's No Such Thing as a "General Public" Anyway!!

Any cross-section of ten individuals will fall into one of four categories, the size of each depending on the issue. There will always be:

Those who are *completely opposed* to your position. This segment of the public is unlikely to change their minds or their behaviour no matter how hard you try, so don't waste resources here. (Do, however, keep track of what they're saying to ensure that you're prepared to counter their arguments.)

Those who are *apathetic*. These individuals either don't have a reason to care about your issue or *can't* act on their concerns due to systemic barriers – the difference is important. Single, career-driven men with no kids may never have a significant interest in playgrounds. But, it's more likely systemic barriers, not apathy, that prevents homeless people from participating in elections. It is important to distinguish whether a segment of the public is truly apathetic or whether it could be engaged if provided the right tools.

(For more on this topic, see Chapter 3, Researching Public Opinion – page 45.)

Typically, targeting your audiences is a multi–step process that involves a combination of logic, research, and consideration of your available resources. For example, if your program aims to prevent people from buying SUVs, logic may tell you that you need to reach car buyers – and those car buyers who can afford to purchase SUVs. But, who among this target will be most open to your messages? First–time car buyers or any car buyer, male or female, old or young? Identifying the more specific "who" (those whose values will make them responsive to your messages) may require research.

Those who are *completely supportive*. You need to continue communicating with this group of the "converted" in order to retain their support, but they shouldn't be your major focus, especially if you're trying to broaden your base of support.

And, at last, there are the *persuadables*. This is the audience you need to reach. Those in this segment of the public have not reached a position on your issue, and often seek a great deal of information before coming to judgment.

Once you have identified the "who," you need to develop your understanding of *what makes these audiences tick*. Developing an informed three–dimensional profile of your audiences is essential because you are aiming to reach beyond your relatively small group of loyal supporters to audiences who may frame issues differently, have different values and priorities, and who will respond to particular language, symbols and terms, either positively or negatively. In order to reach them and to communicate effectively with them, you need to know as much as you can about them.

You will likely need to further delimit your target audiences to match the dollar and human resources that you have available. This means identifying the smallest, clearly defined group that can make the most potent difference. You might identify as a starting point, for example, a specific region or province where car buyers are most open to your message. (Research may assist you to identify this audience.)

The series of questions below is designed to help you begin to locate your target audiences. Through the process, you'll find that you identify two kinds of targets:

- Your A–List or Primary Audiences: Those very specific individuals or groups of individuals that you *must* persuade of your position or argument – and ultimately to take the action you seek – in order to achieve success.
- Your B-List or Secondary Audience: Those supporters, key opponents and others who you could or should also reach.

A. The "A" List – Your Primary Audiences

Your primary audiences consist of those with the *power* to implement the changes you seek and those who influence these power-holding groups. (Depending on your issue and goals, this may or *may not* include any segment of the general public!)

Once you have identified these individuals, or types of individuals, you need to further refine your targets by identifying which segment is *persuadable*. This is called *narrowcasting* and it helps you to focus your resources, and tailor your messages, where they will have the greatest impact.

Here are the kinds of key questions you need to be able to answer:

1. Who — either as individuals or as a target segment of the public — has the power to make the decision or the change you aim to see happen?

   - If you can, name names.
     - *Not "Business leaders" but Conrad Black. Not "politicians," but the Minister of the Environment.*
   - If you aim to reach a segment of the general public, define as many characteristics about them as you can.
     - *Include as many of the demographic and psychographic factors as you can identify – items such as those listed in the box on this page. For example,*

> Demographic variables include the characteristics of a population that can be quantified:
> - Age
> - Gender
> - Family Status
> - Income
> - Geographic Location
> - Nationality/ Ethnic Background
>
> Psychographic variables, as suggested by the term, focus on personality traits:
> - Attitudes
> - Values
> - Lifestyles
> - Opinions
> - Personality Traits
>
> And also typically includes:
> - Media Habits

mothers with children under the age of six, individuals with a history of charitable giving and relatively high disposable incomes, people who drive to work, or…

- List these audiences in order of priority.
  - *Which of these audiences can best help you reach your goals and objectives?*

2. Who (or what) influences this power group?

   - Who helps shape the views and actions of the individuals or groups you have identified?
     - *Does the Minister have an advisor? Does the advisor have issue researchers?*
     - *Might mothers listen to their children's teachers or their doctors on this issue? Or might young professionals listen to their bosses?*

3. Which of these audiences may be persuadable – meaning that they have not yet taken a position on your issue?

   - If you are aiming to reach particular individuals, you may be able to answer this question, based on your current, or accessible, information.
   - If your audience is unfamiliar, answering this question may require additional investigation, including locating or conducting public opinion research.

4. What do they look like? Once you know *whom* you need to reach, you need to build a more complete picture of who they are. This will be critical to the next step: developing messages that will resonate with this audience. Researchers often refer to these factors as psychographics, but the bottom line is you need to determine what your audiences are about:

   - What are their fundamental values and attitudes?
   - What are their lifestyles, their hobbies, their special interests? What organizations might they belong to?
   - What motivates them to act?

5. Where do they get their information? Identifying the communication channels used and preferred by your target audiences will be a key factor when you're ready to develop your strategies and tactics:

- What media do they watch, read or listen to – in order to reach decisions about important issues or activities?
- How do they prefer to receive information – through the media, online, direct mail, face–to–face?
- What organizations might they belong to?

Understanding Diverse Audiences

As Canada's cities become increasingly diverse, many organizations are beginning to explore ways to effectively reach into new communities.

Here Chandra Sharma,[2] shares some of the successful approaches that she has culled from her work as Watershed Projects Coordinator with the Toronto and Region Conservation Authority (TRCA), and in particular through her work on the Community Development for Multicultural Environmental Stewardship (CDMES)[3] project:

Start With Direct Dialogue:

- Meet with community leaders and race relation specialists – An initial brainstorming process will ensure that key issues and barriers are identified *before* you set out to work within particular ethno-specific communities.
- Aim to build partnerships – This will help you to establish trust, to develop culturally sensitive communication material, to address barriers, and to make your programs relevant.
- Identify both the community's – and your organization's internal – needs – It's vital to determine how the community you aim to reach views your issue/s and to incorporate this knowledge in your outreach strategies. It is equally important to identify your organizational needs, and particularly whether or not there is a need for staff "in-reach" to ensure cultural sensitivity.

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B. The "B" List — Your Secondary Audiences

These audiences include those groups of people that you need to reach in addition to your primary audiences.

1. Who do you need to communicate with among those who support your work?
   - Are your organization's staff, board, volunteers, donors and friends an audience?
   - Are recipients of your services an audience?

2. Who do you know is delivering opposing messages?
   - Are oppositional or critical audiences delivering messages — that you need to respond to — to your key audiences?

3. Who — in each media — is covering your issue? Know both sympathetic and the oppositional reporters by name and follow what they write or broadcast about your issue.

- And identify the barriers – New Canadians that is, people recently arrived from other countries, may face a range of barriers to participating in your environmental program. Some, such as lack of access to resources may affect many communities. Other barriers, such as language and culture, are specific to each community.

Understand Your Audience

In working with diverse communities, it is vital to recognize that ethnic communities are not homogeneous; there are differences, for example, between New Canadians and those within the community who have been living in Canada for a longer period. Here are a few additional items to consider.

- New Canadians tend to follow norms. When people are new to a country they tend to aim to follow norms established by that society so it is important for the organization engaged in outreach to make clear the established norms that New Canadians can also follow.

- There are *specific* culture, gender and age issues. The values and assumptions of people of particular cultures can influence the way they work and integrate with other people and how they look at things. Some cultures, for example, divide tasks amongst men and women. These cultural differences may change when people come to a new country, however, they are often so deeply rooted that they can impact your efforts.

- Environment is a *religious* issue for some. Ensuring that your planning and initiatives respect peoples' spiritual and moral beliefs is vital – and can provide a valuable basis for communication. Integrating religious organizations into your planning and outreach can also provide you with access to leadership and an organized mass.

Step Four – Find the Right Words

Your Messages

With a clear sense of your audiences, you're ready to craft your messages — those key phrases that speak directly to the core target audiences — that are the crux of your communications programs. As this component of your plan warrants careful consideration, Chapter 4 of this handbook – Focus On Message Development –page 64, explores this topic in detail.

Step Five – You're Ready to Get Creative

Your Communications Strategies and Tactics

The strategy (how) and tactics (what) that you select to achieve your campaign's aims depend on your objectives, your target audiences, and the knowledge you have gathered about what will move them to respond.

Remember, working through the media is just *one* of your options. Consider, for example, whether the broader public needs to know about your issue right now, or whether you are primarily aiming to reach a very specific set of key individuals. You may find that a single briefing with a key decision–maker would advance your issue more effectively than a strategy that generates 1000 faxes to his or her office.

A. Your Communication Strategies are the "How"

Strategies answer the overall *how;* that is, what broad communication methods you will apply to meet your objectives. *How* will you make new car buyers aware of the environmental impacts of purchasing SUVs? One strategy might be to reach them at key decision points. Your tactics might then involve distributing materials outside car shows and auto dealerships, or placing ads in the automotive sections of newspapers.

How will you stop that corporation from proceeding with its new development? Your strategy might be to reach its executives directly. Your tactics might then include arranging a series of meetings and creating a briefing document.

How will you pressure government to pass that new piece of legislation? Your strategy might focus on pressuring persuadable MPs through their constituents, in which case your tactics might include holding kitchen table or public meetings or mailing out information in their ridings. Or you might want to reach the minister by creating broader public pressure, in which case your tactics might include reaching out through the news media or an advertising campaign that drives people to your website.

Clearly the *how* of your campaign depends on your objectives and can be answered in a multitude of ways. It's worthwhile to spend some time brainstorming a range of options. Each of the potential options you identify should then be closely examined and then assigned a priority ranking of how effective (cost vs. outcomes) it will be in meeting your objectives. You also need to consider whether you have the resources, human and financial, to successfully carry it out.

Here are some key preliminary questions[4] that can help you to establish parameters for your strategy:

1. What are the essential elements that define your initiative? For example:

   - Should your strategies be proactive or reactive?
     - *In other words, will you take active steps to push the issue forward or act only in response to external opportunities and events?*
   - Should your strategies be local, regional, provincial or nation–wide?
     - *Naturally, the reach you need to achieve will influence the kinds of strategies and tactics you need to develop.*
   - Should your strategies focus on building public awareness/ engagement or be targeted exclusively at political/corporate/other decision–makers?

2. What are the major communications opportunities? Identify every item that you can and bring forward the items that you identified in your situational analysis, for example:

   - Is your issue in the news?
     - *Is it either currently or soon to be in the news or the topic of debate?*
     - *Is it currently of heightened public interest or concern?*
     - *Are key policy decisions about to be made?*

- Are any of your allies currently involved in efforts you might get involved in?
  - *What assets can they offer? How might they be engaged in your efforts?*
- Are there events with which you might get involved?
  - *For example, upcoming conferences, tradeshows, etc.*

3. What communications assets are available in or to your organization? Your strategies should take advantage of the assets that are readily accessible. List them. For example, do you have:

- Prominent/famous spokespersons?
  - *Perhaps they would agree to attend an event, be quoted in materials, or appear in a PSA?*
- Strong speakers?
  - *Perhaps they might address public meetings, participate in private meetings or handle media interviews, etc?*
- Well–connected staff, board members, volunteers, etc?
  - *Could they arrange key meetings or encourage vital support, etc?*
- Well–developed media relationships?
  - *This might suggest a media relations initiative such as an editorial board meeting, media briefing, or news conference?*

4. What are the major communications impediments? Again, bring forward every item you can, including the items that you identified in your situational analysis.

- Are there challenges around the issue?
  - *Does this issue have a low public profile?*
  - *Is this issue a "hard sell" – and why?*
  - *Is the public currently opposed to your position? Or, does an opponent currently have the stage?*
- Are there organizational challenges? For example:
  - *Do you have a low profile, limited resources, or a limited reach?*

B. Your Tactics Describe The Activities You'll Undertake

Your tactics, as illustrated above, describe the actual *activities* that you will develop and undertake to fulfill each of the strategies you have identified. There are dozens of methods for reaching an audience – from billboards to one–on–one conversations. (Part 2 of this handbook takes a closer look at some of the tactics you may choose to use.) In selecting and prioritizing the tactics you'll use to meet your objectives, you might begin by considering these kinds of questions:

1. What resources – financial and human – are available to this project?

   - What is your budget?
     - *Determining your dollar resources is key to prioritizing your tactics.*
   - What human resources are available to you?
     - *How much time will be required to meet your communication needs?*
     - *Is this manageable given your staff's workload?*

2. Again, where do your target audiences get their information? Your tactics should take into account the communication channels preferred by your key target audiences, so bring forward the information you identified in targeting your audiences, that is, items like the following:

   - What media do they pay attention to?
   - How do they prefer to get their information: on the web, through the mail, etc?
   - What organizations might they belong to?
   - Who might they listen to: their bosses, husbands/wives, doctors, etc?

3. Based on your strategy, what kinds of activities would assist you to deliver your key message(s) to your target audiences? These activities could include, for example:

   - Public events such as public meetings, demonstrations, rallies, etc.
   - Private events such as meetings and briefings, etc.
   - Print communications such as newsletters, flyers, brochures, direct mail, etc.

- Electronic communications such as website and e–mail communications, etc.
- Media tactics such as advertising, news releases, editorial meetings, etc.

Step Six – Choose Your Moment!

Your Timing and Timelines

With your plan almost complete, you're ready to determine the timing of your initiative. When would your message have the greatest impact? Then, based on the timing you elect, you need to timeline every task that needs to be completed to meet the deadlines you've set.

A. Your Timing

In considering the timing of your communications, it's useful to consider the natural links onto which you can hook your communications. Note as many items as you can. For example:

1. When would your communications have the greatest impact?

2. Does your issue have seasonal implications?

   - Does it occur at a particular time of year?
     - *Smog, for example, is top of mind during the summer months; the bear hunt during hunting season.*

3. Are external events occurring that you can respond to?

   - Is a relevant government action or a relevant industry event upcoming?
     - *Will the government be making a policy or budget decision that will impact your issue area? Or, is there a conference or tradeshow that you could participate in or link your news to?*

B. Your Timeline

To ensure your program stays on track, and that you meet the deadlines you have established in setting your timing, you must create a timeline that details every step that is required to complete the activity, incorporating deadlines and establishing who is responsible for making each activity happen.

If you skip this step, you may find that you are scrambling as key deadlines approach, or that you are unable to produce the items that you originally envisaged within an abbreviated timeframe. For example, your full briefing kit may become a Question & Answer document, or your comprehensive media kit may become just a release, with the result that you are not fully maximizing the opportunities you have identified and are working toward.

The Last Step – Identify the Best Messengers

Your Spokespeople

The last step in defining your plan is to select your spokespeople. While the person with the greatest seniority or prestige within an organization is often automatically assigned this role (regardless of their suitability or skills), it is worth taking a hard look at who are the most effective public representatives for your organization and its issues.

The fact is *who* you elect to deliver the messages you have designed is as important as the messages themselves. And this makes sense: a senior scientist addressing young people might not work as well as the message delivered by a youth peer. And hearing the head of Oilspill Corp. talk about the importance of environmental commitment might cause some dissonance!

Your target audiences must view your spokespersons as credible. For example, according to political campaign consultant Cathy Allen[5], women are more responsive to health care-related messages when mature female messengers deliver them. Men – and usually women – respond best to authoritative male messengers when they are delivering messages about the economy. When "cool" products are being promoted through corporate advertising, research on the "Nexus Generation" (youth from the ages of 10-21) shows that youth tend to respond to other youth messengers who are just a bit older than them.

Who would *your* key audiences view as most credible?

Here are some questions to consider:

1. What situations will require a spokesperson? You may want to train one person to address the government and editorial boards, another to share your message with stakeholders. And, if you are dealing with a number of issues, you may also want to designate more than one spokesperson.

2. Based on your target audiences, what *kinds* of spokespersons would be most effective? Consider who can best reflect the kind of authority that will be effective with your specific target audiences.

3. Who should receive media training? Naturally, providing media training for spokespersons that are not comfortable with the interview process is a vital consideration.

References:

[1] These questions are adapted, in part, from Nigel Atkin, *A Guide for Communications Planning,* 1997. Nigel Atkin is an instructor in the Certificate Program in Public Relations at the University of Victoria. He is also the Director of Communications for the BC Assessment Authority. He provided these unpublished classroom materials, with permission.

[2] Chandra Sharma is Humber Watershed Projects Coordinator with the Toronto and Region Conservation Authority (TRCA).

[3] Much of this learning is captured in ***Human Connection***, a step-by-step video guide available through the TRCA which assists planners, municipalities and other agencies seeking to reach out to the growing and diverse population in the Greater Toronto Area and other regions.

[4] These questions are adapted, in part, from Nigel Atkin, *A Guide for Communications Planning,* 1997. Nigel Atkin is an instructor in the Certificate Program in Public Relations at the University of Victoria. He is also the Director of Communications for the BC Assessment Authority. He provided these unpublished classroom materials, with permission.

[5] Cathy Allen is a Seattle-based communications consultant, who specializes in political campaigning and messaging. She is a frequent contributor to "Campaigns & Elections," a US-based political campaigning think tank.

Worksheet #1 – Your Communications Plan

This worksheet provides you with a step–by–step approach to the strategic planning process, summarizing the questions that were raised throughout Chapter 2. You may want to photocopy this worksheet – and to distribute it to your communications team members – to use as stimulus for your own thinking as you develop each part of your communications plan.

Step One – Starting with the Facts

The Situation Analysis

A comprehensive analysis includes a detailed examination both of your organization and of the external environment. You'll want to identify key factors about your organization and provide details about the issue and the existing landscape – that is, the key players, the public's perceptions, the opportunities, and the threats to your success.

A. Your Organization

This section of your analysis focuses on how your organization is positioned – your history and evolution, strengths and weaknesses. It will likely involve answering the following kinds of questions:

1. What functions does your organization serve? /What services do you provide? (Your mission statement…what you do, for whom, how and why.)

2. What is your role and impact in the community? For example:
   - The benefits that result from your programs and services -- and for whom -- include:
   - *Your niche compared to other organizations working in this area is:*

3. What have been your major successes? / What are your key performance indicators? For example:
   - ▶ You have grown in:
     - Size/reach:
     - Programs/program areas:
     - Support [members/dollars, etc.]:
     - Other:
   - ▶ Your key achievements include:
     - Successful initiatives/campaigns:
     - Successful programs:
     - Other:
   - ▶ *The factors that illustrate you are the right organization to address this issue are:*

4. What might be the *challenges* you'll need to address in taking on this issue?
   - ▶ For example:
     - Low profile:
     - Limited resources:
     - Geographic reach:
     - Other:
   - ▶ *You could address these challenges by:*

In order to develop a clear picture of the issue and the current lay of the land, you need to consider the facts around your issues, how the issues and your organization are *perceived* and how you *want* them to be understood.

1. What is the issue?

   - The pertinent historical and current facts and stats are:
   - It's important because:
   - Its impacts are (what):
   - It affects (who?):
   - *The repercussions of not addressing this issue, now, are:*

2. How is the media treating this issue?

   (Note: this topic is more fully explored in Chapter 3 – see Media Trend Analysis, starting on page 51.)

   - How much coverage is your issue receiving?
   - Which media {newspapers, radio, television, consumer or trade magazines) are covering the issue?
   - How are stories being framed – what aspects of the issue are being covered; what context is being provided?
   - What are the gaps and inaccuracies in the coverage?
   - *How do you need to shape the media's coverage?*

3. What is the public's perception of the issue?

   - The level of public awareness is:

   - The level of public understanding is (accurate v. not accurate):

   - This issue is/isn't generating debate (on the ground, in the media, or in political circles):

   - Recent studies or public opinion surveys, and those you can access include:

   - *Do you need to undertake more research to understand the public's opinions and attitudes?*

4. What is the public's perception of your organization and its approach?

   - Your organization is known/not known for its work on this issue:

   - You are generally perceived as ("grassroots," as mainstream, as credible, as radical...):

   - Your organization has/hasn't done notable lobbying, in person or through correspondence:

   - You have been positioned within the media (positively, negatively, with in–depth or superficial coverage or not at all) as:

   - *You want to be perceived by the public, and others as:*

5. Who are the key players?

   - The following (individuals, publics, organizations, decision–makers, stakeholders, etc.) are driving this issue:

- *You need to find out the following about these individuals, publics and organizations:*

6. Who are your allies...and potential allies?

   - The following are publicly supportive, or could be supportive of our position:

   - The following people are affected, and are represented by:

   - *You may want to collaborate with:*

7. Who is your competition?

   - The following are delivering similar messages or programs, and they are saying:

   - *The strengths and weaknesses of each competitor include, and you are different/better because:*

8. Who are your current... and potential opponents?

   - The following are publicly opposed to your position, and their messages are having the following impacts:

   - Your work in this area could cause the following new opponents to surface:

   - The strengths and weaknesses of each current and potential opponent are:

   - *In order to counter their arguments and efforts you should:*

Your Overarching Goals and Objectives, and Communication Objectives

The focus in step two is on defining or simply bringing forward the goals and objectives you have already established at the heart of this effort – and to delineate the communication objectives that will form the basis of this particular communications plan. (Refer to the box on page 13 – A Few Key Terms Defined – for definitions of the relevant terms.)

A. Your Organizational Goals:

Establishing issue–based goals involves answering these kinds of questions:

1. What is the ultimate purpose of your program/initiative?
2. Where do you need to focus your efforts in order to achieve this? (For example, political action, social change, industry action, etc.)
3. What is the projected timeframe for achieving your goals?

- Goal # 1

To:

____

1. What is the ultimate purpose of your program/initiative?

by:

____

2. Where do you need to focus your efforts in order to achieve this? (For example, what political action, social change, industry action, etc.)

within/by

____

3. What is the projected timeframe for achieving this goal?

- Goal # 2

To:

by:

within/by:

▶ Goal # 3

To:

by:

within/by:

Also important are goals that address how you want your organization and the issue to be perceived:

▶ Goal # 4

To position (organization)

as:

___

4. How do you want your organization to be positioned?

▶ Goal # 5

To position (issue)

as:

___

5. How do you want your issue to be positioned?

B. Developing Objectives:

Here the focus is on defining the shorter–term outcomes that will help you meet your overarching goals:

1. What smaller wins or “mini–goals” will help you achieve your overall objective?
2. What is the projected timeframe for achieving your objectives?
   - ▶ Within how many months/years or by what date?
3. How will you measure your success in reaching each objective?
   - ▶ What will your benchmarks be?

▶ Objective #1: To ___

___

1. Outcome[target audience/action]

within/by: ____

2. Timeframe

Your benchmarks are: ______________________________________

____

- Objective #2: To ____

  ____

  1. Outcome[target audience/action]

within/by: ____

2. Timeframe

Your benchmarks are: ______________________________________

____

- Objective #3: To ____

  ____

  1. Outcome[target audience/action]

within/by: ____

2. Timeframe

Your benchmarks are: ______________________________________

____

C. Defining Your Communication Objectives:

Based on the overarching goals and more specific objectives that have been established, communication objectives define the communication outcomes that will help move a target audience towards the action you are seeking. Communications objectives are aimed at affecting what audiences know (building basic awareness or greater knowledge), what they think or feel (their current attitudes), and ultimately what they are doing (their actions or behaviour) around an issue.

1. For each campaign/program objective, what is the *communication outcome* you aim to achieve?
   - Are you aiming to affect what your audiences know?
   - Are you aiming to change what they think or feel?
   - At this stage, what do you want them to do? (What is the call to action?)

2. How will you measure success?
   - What will your benchmarks be?

- Objective #1: To

  1. outcome [target audience/action]

  within/by:

  2. timeframe

  Your benchmarks are:

- Objective #2: To

  1. outcome [target audience/action]

  within/by:

  2. timeframe

  Your benchmarks are:

- Objective #3: To

  1. outcome [target audience/action]

  within/by:

  2. timeframe

  Your benchmarks are:

- Objective #4: To

1. outcome [target audience/action]

within/by:

2. timeframe

Your benchmarks are:

Step Three – Identifying Who You Need to Reach

Your Target Audiences

Defining target audiences is a multi–step process that typically involves a combination of logic, research, and consideration of the available resources. Once the "who" has been identified, it is vital to develop an understanding of *what makes this audience tick*. There are usually two kinds of targets, the A–List (Primary Audiences) and B–List (Secondary Audiences.)

A. Your "A" List – Primary Audiences:

Primary audiences consist of those with the power to implement the changes sought and those who influence these power–holding groups. This may or may not include a segment of the general public.

1. Who are the decision–makers? In other words, who – either as an individual or as a group – has the power to "make it happen?"

   - Aim to name names:

   - For each segment of the public, define as many characteristics about them as possible.

   - List these audiences in order of priority:

1. Who (or what) influences this/these power group(s)? (In some cases these may be the same.)

   - Who helps shape the views and actions of the individuals or groups you have identified?

2. Which of these audiences may be persuadable?

3. What do you know about them?

   - What are their demographic features? (Age; gender; rural/urban; education; family situation; income; etc.)

   - What are their psychographic features: their fundamental values and attitudes?

   - What motivates them to act, and why?

   - What are their personal or special interests?

   - Where do they get the information that shapes their views?

   - Is your issue new, is it on their "radar screen" (i.e., basic awareness), or is your audience already engaged on the issue?

B. Your "B" List – Secondary Audiences:

These audiences include groups of people that should or might be considered for communications in addition to the primary audiences.

1. Who do you need to communicate with among those who support your work?

   - Are your staff, board, volunteers, donors and friends an audience?

   - Are recipients of your services an audience?

2. Who do you know is delivering oppositional messages?

- Who is delivering critical or oppositional messages – that you need to respond to – to your key audiences?

3. How has each media represented your issue?

- What are the names of the sympathetic and the oppositional reporters?

Step Four – Finding the Right Words

Your Messages

This component of the plan is addressed in Chapter 4 of this handbook. See Worksheet #3 – Steps to Developing Your Message – page 75.

Step Five – You're Ready to Get Creative

Your Communications Strategies and Tactics

Strategies answer the overall *how* – the broad communication principles or steps that will be applied – to meet the defined objectives. Tactics describe the actual *activities* that will be developed and undertaken to fulfill each strategy.

A. Communication Strategies:

1. Based on your communication objectives, what are the essential elements that define your initiative? For example:

- Will your strategies be proactive or reactive, or both?

- In order to reach your target audiences, will your strategies focus on key individuals, or be local, regional, provincial or nation–wide?

- Should your strategies focus on building public awareness/engagement or be targeted exclusively at political/corporate/other decision–makers?

2. What are the major communications opportunities? For example:
   - Is your issue currently of heightened public interest or concern?
   - Is it currently or soon to be in the news?
   - Is it currently or soon to be the topic of political debate or policy decisions?
   - Are there upcoming events you might get involved with?
   - Are any of your allies currently involved in efforts in which you might become involved?
3. What communications assets are available in or to your organization, and how might they be used? For example, do you have:
   - Prominent/famous spokespersons?
   - Strong public speakers?
   - Well–connected staff, board members, volunteers, etc?
   - Well–developed media relationships?
   - Other assets?
4. What are the major communication challenges or impediments? For example:
   - Issue–based challenges?
   - Organizational challenges?
   - Other challenges/impediments?

B. Communication Tactics:

1. What resources, financial and human, are available to this project?

    - What is your budget?

    - What human resources are available?

2. Where do your target audiences get their information?

    - What media they pay attention to?

    - How do they prefer to get their information: on the web, direct mail, word–of–mouth, etc?

3. Based on your strategy, how do you plan to deliver your key message(s) to your target audiences (e.g. public events, private meetings, written communications, through the media, online)?

Step Six – Choosing Your Moment!

Your Timing and Timelines

Your task here is to determine the best timing for your efforts. Then, based on the timing you select, you need to timeline every task that must be completed to meet the deadlines you've set.

A. Timing:

It's useful to consider when communications would have the greatest impact and the natural links onto which communications can be hooked.

1. When would your messages have the greatest impact?

2. Does your issue have seasonal implications?

3. Are external events occurring that you can respond to?

B. Timelines:

The project timelines should detail every step that is required to carry out the activities and to produce the products entailed by each communications strategy. They should also allocate responsibility and establish deadlines for achieving each task.

Step Seven – Identifying the Best Messengers

Your Spokespeople

The last step in defining your plan is to select your spokespeople. Take a hard look at who are the most effective public representatives for your organization and its issues.

1. What situations will require a spokesperson (meetings, media, public events...)?

    ▶

    ▶

    ▶

2. Based on your target audiences, what *kinds* of spokespeople would be most effective?

    ▶

    ▶

    ▶

3. Who should receive media training?

    ▶

3. Researching Public Opinion

Methods for Finding Out What People Think

The importance of addressing your communications to specific audiences – and building your communications on a depth of understanding of those audiences is stressed throughout this handbook:

- Identifying who can make the greatest difference – ensures that your communications are directed toward where they will have an impact.
- Establishing where they are at – ensures your messages are directed toward the right stage of engagement – as described in Chapter One.
- Knowing what they are about – ensures that you build your messages on their fundamental values – which is where the opinions you are aiming to foster have the greatest staying power.

More often than not, determining the answer to some part of this equation could benefit from research.

♈♈♈

This chapter of the handbook starts with a look at the two most frequently used

Public Opinion Research Can Help

- To define who – what clearly defined segment of the public is most open to your issue? In other words, who are your "persuadables?"
- To identify current levels of awareness – ensuring that your messages are focused where your audiences are at on your issues.
- To identify current levels of knowledge or understanding – to identify whether there are misconceptions that need to be addressed.
- To identify behaviors – to identify current behaviours you may want to reinforce or change. And to identify what actions people may be willing to undertake, and under what conditions.
- To identify barriers – what might be preventing people from supporting your position or taking action?
- To identify effective messages – what kinds of positions appeal and resonate with people? What are their values, motivations, the reasons they care, the benefits they want…
- To test your messages – will they work?
- To fine-tune or re-position your campaign – identifying what didn't work.
- To measure the success of your communication efforts to date.

To make your case...to decision-makers and through the media:

- To illustrate levels of public concern ...and support for the actions entailed by your position!

research methods. It also elaborates a number of methods for locating the information you may need and outlines some of the key considerations involved in developing a research agenda. (At the end of the chapter, you'll find a worksheet – Worksheet #2 – Your Research Agenda – to assist you in this process.)

The Two Most Common Research Methods

Surveys and Focus Groups

Surveys and focus group research are the most commonly used methods for generating new information about what the public thinks. Each, as described below, can provide you with different kinds of information about your audience's core values, attitudes, and concerns.

A survey can tell you, for example, who is concerned – and to what degree. A focus group allows you to probe the underlying values and attitudes that motivate that concern, or lack of concern, and to actually listen to the language people use in talking about your issues.

Either of these research methods can be used alone, depending on your specific information needs, or they can be combined to build a three–dimensional picture of the audience you should aim to reach. You might for example, convene a focus group in advance of a survey to identify themes, phrases and actual words that resonate and then test the broader appeal of your findings through a survey. Or you might hold a focus group following your survey to explore the underlying bases for the kinds of responses your survey received.

1. Public Opinion Surveys (quantitative research) – A survey is valuable when you are looking for *statistically valid information* about your potential audiences. While conducting an independent survey can be prohibitively expensive, many research firms also conduct *omnibus polls* through which multiple organizations ask questions and share the expense of running the survey.

Common Kinds of Polls

- Benchmark polls and tracking polls – measure the initial state, and with periodic repetition, measure the state of opinion change on a particular issue over time.
- Strategy polls – test the effectiveness of specific messages.

Usually conducted by telephone, public opinion surveys poll randomly–selected people either representing the general population or a particular population (based on demographic or other audience characteristics). Polls are particularly valuable, for example, in:

- Providing an overall measure – that allows you to assess the importance or relative importance of issues, attitudes, etc.
- Establishing who holds certain opinions – by analyzing the demographic variables attached to various responses.
- Establishing who holds certain combinations of opinions – by combining (cross tabulating) how particular sets of survey respondents answer different questions.

2. Focus groups *(*qualitative research) – Focus groups are useful when you want to obtain in–depth information and insights about a particular audience, rather than statistical data. (As focus groups involve only a small number of people, you cannot generalize the results across an entire population.)

   A typical focus group consists of six to ten individuals that have been randomly recruited but that share a set of qualities that are apparent in the particular target

In order to communicate effectively, you need to know as much as you can about your target audiences.

Research can help you to identify:

- What they look like:
  - Age
  - Gender
  - Geography: location, rural/urban
  - Ethnicity: first language, religion, etc.
  - Education
  - Family situation
  - Income and employment
- What makes them tick:
  - What are their core values, attitudes, and lifestyles? What do they care about?
  - What are their values with respect to the environment in particular?
  - What are their motivators? What would cause them to act on your issue, and when?
- What they know about your issue:
  - What is their current level of awareness, knowledge, or engagement?
  - What are their conceptions, and misconceptions, about your issue?
- Where they get the information that shapes their views:
  - What media do they pay attention to?
  - What individuals do they listen to?
  - What organizations do they belong to: church, community service, business, political, other?

audience that a research sponsor wishes to investigate (e.g. young urban professionals, or first time car buyers, or mothers of teenagers, etc). A trained moderator will lead the group through a short (often two hour) session using a discussion guide that has been prepared in advance.

The strength of focus groups is that they allow you to ask open–ended questions that are prohibitively expensive to include in a survey. You can hear and see, in great detail, what people representing your potential audiences think and respond to, and probe why. A focus group may, for example, help you to uncover new themes, discover language that is meaningful for the audiences you aim to reach, and identify themes and words to avoid. Focus groups are valuable, when you want to, for example:

- Probe the underlying attitudes, values and biases, perceptions and motivations:
  - *To determine the bases for your own messages.*
- Extensively explore or test how people respond to your messages:
  - *To identify both what works and what does not work in your messages and materials.*
- Identify effective language
  - *To discover – down to the phrases and precise words – the language people actually use in discussing your issue and that could be used to persuade other target audience members.*

Step One - Locating the Current State of Public Opinion

Some Options

Your need for information about who are your audiences can be fulfilled in a number of ways – which may or may not involve contracting a research firm to conduct new (primary) research. Over the pages that follow, a number of potential steps and approaches are identified.

Take Advantage of Existing Information

Before you allocate resources to new research, the best first step is to locate any existing and accessible secondary information that is relevant to your issue and information needs. This will help you to avoid duplicating existing information and to develop the hypotheses that will inform your own research. Once you have located and digested the available information, you'll be ready to formulate the agenda for any new research that you intend to conduct (see step two) whether through professional research or by conducting your own primary research (see step three).

Each of the suggested approaches below will provide you with valuable information about your audiences and the messages they are currently receiving. You may want to consider one or more of these options:

A. Public Opinion Research Audit – to determine the current values and attitudes currently held by specific segments of the Canadian public.
B. Media Trend Analysis – to determine the context that is being set by the media.
C. External Program Audit – to learn from the successes (and failures) of other organizations that have undertaken similar initiatives.

Here are some Canadian research firms that publish certain survey results on the web:

- Statistics Canada: www.statcan.ca/start.html
- The Council for Canadian Unity's Centre for Research and Information on Canada (CRIC): www.cric.ca
- DCode (nexus generation): www.d-code.com
- Environics (voting intentions): erg.environics.net/polls/
- Ipsos Reid: www.angusreid.com
- Leger Marketing: www.legermarketing.com
- Pollara: http://www.pollara.ca

A. Public Opinion Research Audit

On any given day, Canadians are being surveyed by any range of organizations and on a vast array of topics – and this information can be very useful to you in defining your audiences and formulating your plans. The secondary data you locate may even be sufficient to meet your immediate requirements, eliminating the need to generate new research information.

As you approach this part of your research, remember that public opinion polls are a snapshot of what the public thinks at a specific point in time, so a poll that is several years old may be of only limited use. An infinite number of factors may have affected the landscape in the intervening period. When the question was asked, for example, can influence the results as other events that occurred at the same time may have, temporarily or permanently, affected people's opinions. (For example, surveys generally show that Canadians consider themselves to be distinct from the United States. Immediately following September 11th, however, Canadians indicated feeling closer to, and more like, our American neighbours. That immediate reaction, however, rapidly subsided.) If, on the other hand, polls over a number of years typically show similar results the findings can be viewed as indicative.

And, a final consideration: take a look at the source of the research, the exact wording of the question and any prefacing remarks. The way a question was introduced, and the specific words that were used, can influence the results. With all of that said, here are a few starting points:

- Search the net. Some research groups and organizations publish their survey results on their websites. You may locate the results of recent polls with an environmental focus, but also useful are surveys that probe Canadians' current concerns, values and attitudes. Can you link your messages to their current concerns about their health, the economy, education, government spending, etc?

- Approach research organizations that are known to have an environmental focus. The Environics Research Group, for example, has conducted a quarterly poll and published the results in its *Environmental Monitor* since 1987, tracking Canadian opinions on a range of environmental issues. While they don't publish the results on the web, they are sometimes open to providing a limited amount of specific information in response to a request.

- Approach other like–minded organizations to see if they have conducted any research that they are willing to share. (Consider too approaching these organizations to see if they'd be interested in sharing the costs of a new piece of research.)

B. Media Trend Analysis

A media trend analysis, as the name suggests, involves analyzing past and current media coverage of your issues. This can be very useful from a number of perspectives. First, as noted elsewhere in this handbook, the media have a tremendous impact on the public agenda, so reviewing how your issues are, and are not, being covered currently will provide you with information regarding the public's current levels of awareness. If you're issue is never in the news, chances are the public doesn't know about it. More particularly, a media trend analysis will provide you with tangible information about the kinds of messages they are receiving. This information will also be useful to you in plotting your own media approach, as well as in identifying individual publications and journalists that you'll want to ensure are on your media lists.

If you choose to undertake such a review, many larger public and university libraries subscribe to searchable electronic databases that summarize the contents of the daily newspapers and major periodicals.

As you plot your audit, consider again the typical route an issue cycles through as described in Chapter one– page 3. To make this task manageable, you may want to look at a particular time period (the past two or three years), particular publications that are a key conduit to your particular audience, or you may want to examine coverage of some particular element of your issue (e.g., how often is the need for government action on your issue referenced; how often is Acme Corporation referenced in relation to its record on toxic dumping).

Here are some of the factors that you'd want to look for in your review:

1. Where is your issue being covered?
    - Are the daily newspapers covering your issue, or is it still being covered only by trade publications?
    - If it is being covered by the dailies, where in the newspaper is the story being placed?

2. Who is writing about your issue?
    - Do particular reporters generally cover your issue – indicating a commitment to the issue – or is it assigned to various staff writers?

3. What is the context and content of the coverage?
   - How is the issue being framed?
   - Who is viewed as being the cause of the problem? Who is viewed as holding the solution?
   - Is the issue being covered as individual isolated incidents or is the larger context being provided?
   - Whose perspectives are being presented?

C. Program Audit – Review of Other Campaigns and Initiatives

Looking at similar initiatives that have been undertaken by other Canadian and American organizations can also provide you with useful information. It can inform your hypotheses about who are the right audiences and what messages might be effective. Investigating, from their perspective, what worked and didn’t work can also provide valuable insights in developing your strategies and tactics.

1. What were/are their objectives?

2. Who did they target?
   - Who did they identify as key target audiences, and why?
   - Did they conduct any research, and are they willing to share it?

3. What were/are their messages?
   - What was/is the call to action?
   - What response did it/has it received?

4. What was their approach?
   - What strategies and communication tools did they use?

Your Overarching Objective

In order to develop an effective research project, you need to be absolutely clear about what it is that you *need* to know. That's because – even outside any budgetary considerations – for methodological reasons, the number of questions you can ask is limited. For example, in a two-hour focus group, you can only really cover between four and five questions. Telephone surveys, the most frequently used method for surveys, must also be abbreviated to encourage increasingly reluctant participants to complete a whole survey.[2] You may also find you need to dedicate more than one question to a particular aspect of your issue to obtain the full information you need. This means that you need to separate the "need to know" from the "nice to know" information.

If you are using a professional firm to undertake your research, you will receive guidance in selecting your research methods, defining your focus and developing your questions. If, on the other hand, you are adding questions to an omnibus poll you may find that you receive more limited support. In either case, the greater your clarity about your information requirements, the more likely it is that the research you undertake will answer your most pressing needs.

On Writing Survey Questions

Writing questions may seem like an easy task, but, there are a number of pitfalls to avoid. Here are a few examples of the kinds of advice that are offered in an excellent publication available on the Internet –called *Questionnaire Design: Asking questions with a purpose* by Ellen Taylor-Powell [1]:

- Use simple wording – to ensure that your questions are understood by people with varying education levels, and by people who are hearing your questions over the phone.
- Ensure your wording is not open to different interpretations. Words like "often" or "occasionally" mean different things to different people. Be precise if you mean once a week, twelve times a year….
- Be specific. Refer, for example, to specific time periods, (e.g. between January and June or in 1995) , age ranges (e.g. not teenager, but an individual between ages 13 and 19) or conditions (temperatures over 35 degrees).
- Ensure only one answer is possible. When providing a list of options, ensure only one answer will be appropriate to any one respondent.

⇨

As a starting point, it is very useful to develop an overarching statement that expresses the fundamental reason behind your research. Here are some questions to consider in designing that statement.

1. What is the purpose of this research? Why are you undertaking it now?

- Is it for internal (to define or refine your campaign) or external (to make your case/gain publicity) purposes?
  - *It's important to make this distinction. The research method (quantitative versus qualitative) you choose and the questions you ask may be different, depending on your answer. If so, it is important not to compromise your opportunity to undertake research in order to try to make your research do double duty.*
- Think about your communication objectives:
  - *Do you need to gauge, for example, your audience's current levels of awareness, opinions, knowledge or support for the issue?*
- Think about your messages:
  - *Do you want to identify what themes resonate; that is, the values and attitudes of potential target audiences? Or, do you want to test messages you have developed?*
- Think about your call to action:
  - *Do you need to know who, and under what conditions or for what reason, is likely to undertake the actions your campaign will advocate?*

- Don't make assumptions. Don't assume that people either have--or do--specific things. For example, a question that begins with "When you recycle your newspapers," assumes that the respondent both recycles and recycles newspapers." Asking "Does your car get good mileage?" obviously assumes the respondent owns a car.
- Avoid biasing the question! Taylor-Powell suggests that a question might be biased in the following ways (examples added):
  - *Assuming people should be engaged in particular behaviour or feel a certain way (Most people believe they should use their cars less. Do you agree ..?*)
  - *Loading the response categories in one direction. (Would you describe your experience as positive, very positive, or extremely positive!)*
  - *Using phrasing with strong positive (e.g. freedom,) or negative (red-tape) connotations.*

- If this research is for external purposes, think about the audiences for the research results:
  - *Is it for identified decision–makers, the media, or the public?*
  - *What information do you need to make your case with that audience?*
  - *What information would that audience find compelling?*

2. What do you know about your target audiences already?
   Answering this question can help you to set some parameters (and save some costs) for your research. If you can clearly identify certain key distinguishing characteristics, for example, perhaps you can obtain the information you need through focus groups. Or if you can focus their geography, you may only need to survey a particular province or region.

   - Does the nature of your issue clearly dictate some of the characteristics of your audience? For example: you know you're only aiming to reach people in Ontario, or you know that you need to reach women with children, car buyers, homeowners, liberals, students, etc.
   - Do the ultimate decision–makers (those who can make it happen) clearly dictate some of the characteristics of your target public audience? If you're ultimately aiming to reach a particular politician, perhaps you've identified your "general public" as his or her constituents and more specifically those who voted a certain way within his/her riding. Or, if you want to get through to a particular business leader, perhaps you have decided to reach his or her customers, or employees.

3. Finally, based on what you know -- that is, your answers to the preceding questions -- what are the most pressing gaps in your information?

Step Three – Continue to Learn by Taking Every Opportunity to Listen

Low Cost Opportunities

Outside of conducting professional research, you'll find that there are many opportunities to learn about your audiences. In fact, every point of contact you have provides you with a potential for insight. While the results may not be scientific, you can still derive valuable information that can inform your approach. What does your typical current supporter look like? What new potential supporters are you reaching? What do they look like? Here are a few approaches.

1. Questionnaires and surveys: Consider distributing a very short questionnaire, or conducting brief surveys, for example:
   - At your events
   - On the web
   - In your direct–mail

2. Key informant or one–on–one interviews: If you want to reach particular individuals, or if you have a good sense of what your target audience looks like, you can derive useful information by conducting one–on–one interviews – with a cross–section of individuals that represent that population, the very individuals you aim to reach, or people who understand their concerns (for example, a Minister's advisors).

3. Member and donor surveys: Who are your current supporters? While you are aiming to reach outside this core group, you may nonetheless gain surprising insights into the motivations of people who are interested in the issue.

4. Conduct your own focus groups: You *can* conduct your own focus groups. For an overview of the process, read on.

> **On Developing Questions**
>
> Judith Sharken Simon[3,4] recommends developing an initial series of questions and then pulling out your purpose statement to whittle them down by asking:
>
> - Which questions do not apply to our stated purposes?
> - Which questions seem really important?
> - Will your participants be equipped to answer each question?
>
> Once you have narrowed your questions to the top five, in addition to advising that you find someone with good editing skills to rewrite them, she suggests that the next step is to arrange the questions in a sequence that will be comfortable for the participants, moving:
>
> - from the general to the specific,
> - easy to challenging, and
> - positive to negative.
>
> Finally, you need to test your questions to ensure that they actually work the way you envisage.

How to Conduct a Focus Group

A Closer Look at the Process

Professional research firms are highly skilled at developing and conducting focus groups, however, you can achieve worthwhile results if budget limitations require you to undertake the process yourself.

That said, to conduct a successful focus group does require careful planning and consideration – and it is worth learning as much as you can before you proceed. A very useful resource for working through the process is a publication called *Conducting Successful Focus Groups* by Judith Sharken Simon.[3] This book– part of the Amherst H. Wilder Foundation's Nonprofit Field Guide Series – contains detailed step-by-step information along with worksheets to help you through the process. Indeed, a goodly portion of the advice provided below has been drawn from an article called *How to Conduct a Focus Group*, authored by Judith Sharken Simon based on that publication.[4]

A. Designing the Focus Group

Designing a focus group involves a number of key parts – and starts with your clear definition of exactly what it is you aim to learn through your session/s. This is key to setting your direction. (Sharken Simon calls this a "Purpose Statement" and emphasizes that this clear and concise statement is key to identifying your participants, developing your questions, and getting useful results.[5]) In addition, this statement will provide the basis for developing both the actual script that will guide each session.

Developing Your Questions

Remember, within a two–hour timeframe, you'll be able to ask at most four to five questions. (Consider that you need time for an introduction and a closing, as well as perhaps twenty minutes for discussion of each question). In fact, you will really only have the opportunity to ask perhaps three probing questions as the first one or two questions will be warm–up questions that are designed to allow your participants to start to engage in the topic.[6]

Focus group questions, unlike those on a questionnaire or survey, which are devised to elicit specific close-ended responses, focus on asking open-ended questions that allow your respondents to reply in *any* way that is meaningful to them. Here is some advice:

- Consider probes other than questions if they'd be useful in gaining information about your issue.
  - *For example, you can ask participants to: Tell you about the first time…Describe how they feel when … Take you through the process of…*

Writing Your Script

Once you have prepared your questions, you are ready to write your script. This process allows you to walk through how the session will run and to ensure that the session has a logical flow and that you have provided your participants with enough context to ensure your questions will make sense. It also ensures consistency among your focus groups which allows better comparison of the results.

In keeping with any presentation, there are three natural components to your script, including the welcome and introduction, the main section where you ask your questions and the closing/thank you. Here is an important note: As you write your script ensure that your introduction has provided your participants with any context and background information they need to be comfortable with the process.

B. Identifying Your Participants

As noted earlier, your purpose statement will likely point to the kinds of participants you need to recruit. You should also plan to "over recruit" to ensure that you obtain the number of participants (anywhere from six and twelve) that you are looking for. (Reminder calls should be made on the day before or the day of the session to ensure your participants still intend to attend.)

In selecting your participants, it is important to recognize that people are most at ease – and hence most open – with people who they perceive as being like themselves. For that reason you need to ensure that your group members share key traits (for example, age, sex, interests, etc.). At the same time, however, you need to ensure enough diversity among your participants that you'll get a range of opinion.

Finally, to encourage participation you may want to make it easier for people to agree to be involved (for example, by providing transportation, covering expenses or supplying childcare) or by offering some small gift, voucher or cash incentive.

> **Selecting Your Facilitator**
>
> You don't necessarily need to hire a professional facilitator; however, the person you select should have these key qualities. He or she must:
>
> - Be a skilled group leader – meaning s/he can generally keep the group on topic, elicit broad participation and handle those problematic personalities.
> - Do their homework on your topic – so that s/he'll be able to answer the questions that may arise – and identify those off-topic discussions that are worth allowing to evolve.
> - Be a match for your particular participants – ensuring your group's members will feel able to openly and honestly express their feelings and opinions.

Where can you find your participants?

Answering this question may require a certain amount of ingenuity. Below are a few options. Just ensure that your methodology allows you to obtain the diversity you need – and that your participants don't know each other.

- Classified advertising – is an option used by professional researchers.

- *Ensure that you specify the key characteristics of the participants you wish to involve.*

- Through your networks – including your staff, board members, plus the organizations you and they are affiliated with – you may find people who represent the participants you're looking for.
- Through brainstorming what organizations your desired participants may belong to or the affiliations they may have.
  - *For example, perhaps you can recruit young mothers through day care centre or schools, or civic minded adults through the local volunteer centre, etc.*

C. Conducting the Focus Group

Key to getting the most out of your focus groups are:

- Ensuring the broadest participation – Your aim is to get the depth of information that comes from the group's interaction with each other, not simply their individual answers to your questions.
- Getting complete answers – your facilitator should be prepared to "probe" the answers that she or he receives to ensure a full understanding of why someone, or the group, is responding in a particular way.
- Monitoring the time and keeping the discussion on track – to ensure that you cover the key items, or you may find that your facilitator is only beginning to ask the more serious questions as the session is ending.

Immediately following the session, your facilitator and observers should review the session to capture their initial impressions while they're fresh. And, particularly if you're relying on notes of the session only, your facilitator and observers should also take the time, immediately, to expand on those notes to ensure that you

> Choosing the Location
>
> Beyond the usual concerns regarding accessibility and comfort — ask these questions:
>
> - What message does this setting send?
> - How might it affect the information gathered?
> - Will it have an impact on — or potentially even bias — the information participants offer?

have the fullest set of information possible.

D. Reporting the Results and Preparing the Report

Recording the Session

Recording the session does not necessarily mean videotape, but may mean audio taping the session. You should also charge a person with taking notes to record key details (for example non-verbal cues, etc.) and ensure that all is not lost should the tape fail. Your note taker should also periodically indicate the time against the notes to facilitate review of the tapes. (This person cannot be your facilitator as s/he will have his/her hands full conducting the session.)

Once you've completed your focus groups, you'll want to move rapidly to summarize each session in anticipation of preparing the final report. If you are relying on the tapes that you have made of your session(s) you may want to send them to a transcription service as you'll find transcribing hours of material is both time consuming and tedious.

In preparing your report, you may want to begin by reading through all of the transcripts or your notes as a whole to get an overall sense of the material. Then you can reread the material with an eye to identifying the material that is key to your report. Naturally you'll want to note the comments that were made repeatedly. You'll also want to focus on any comments participants made that directly relates to your objectives, the major opinions and attitudes that were expressed, the kinds of language and words that were used. And you should also explore any surprising comments that were made.

Finally, Sharken Simon notes that "context and tone" are just as important as the words that are used. She suggests, for example, that comments that were "phrased negatively, elicited emotional responses, or triggered many other comments", that would be worth noting in the analysis. [7]

[1] Ellen Taylor-Powell, Questionnaire Design: Asking Questions With a Purpose (University of Wisconsin – Extension, Cooperative Extension, May 1998), http://www1.uwex.edu/ces/pubs/pdf/G3658_2.PDF (July 5, 2002).
[2] Mail and e-mail questionnaires can be lengthier.
[3] Judith Sharken Simon, *The Wilder Nonprofit Field Guide To: Conducting Successful Focus Groups*, (Minnesota: Amherst H. Wilder Foundation: January 1999). This publication is available through the Foundation which can be reached at 651-642-4000 or online at http://www.wilder.org.
[4] Judith Sharken Simon, *How to Conduct a Focus Group,* *http://www.tgci.com/publications/99fall/conductfocusgp.html* (June 6, 2002).
[5] Ibid.
[6] Ibid.
[7] Ibid.

Worksheet #2 – Your Research Agenda

1. What is the purpose of this research – why are you undertaking it now?

   - Is it for internal (to define or refine your campaign) or external (to make your case/gain publicity) purposes?
   - Think about your objectives:
   - Think about your messages:
   - Think about your call to action:

2. If it is for external purposes, who are the *audiences* for the research results?

   - What information do you need to make your case with that audience?
   - What information would that audience find compelling?

3. What do you know about your target audiences already?

   - Does the nature of your issue clearly dictate some of the characteristics of your audience?
   - Do the ultimate decision–makers (those who can make it happen) clearly dictate some of the characteristics of your audience?

4. Based on what you know, what are the gaps in your information? What do you need to find out?

Developing the Right Messages

In chapter two, developing your strategy and messages, it was emphasized that developing effective messages – around your organization and your issues – is the crux of your communication strategy.

Messages are usually short phrases that are rich in symbols and that speak *directly* to the core values of your *specific* target audiences. This is one of the many reasons why developing a depth of insight about your target audiences is so vital. Based on your knowledge of your audiences' values, concerns and motivations, and their current level of awareness, you will describe your positions and arguments in the language, specific words and symbols that will encourage your audiences to respond in the ways you seek.

These few select central themes will then be repeated in every communication: in your brochures and media materials, on your website, and in your advertising. Your messages will also be elaborated and repeated in the "talking points" that your organization's spokespeople will use when briefing decision–makers, making public speeches or being interviewed by the media.

This repetition is key not only to break through the barrage of messages that face everyone every day, but also because people only remember at most three distinct messages about a specific organization or issue, but more typically one message at a time. (They are also more likely to remember a message if they've heard it at least three times within two weeks and if it is delivered in a variety of ways: concrete examples they can personally relate to, statistics, analogies, and historical references. And, they are *most* likely to remember a message that speaks to their values.)

♈♈♈

This chapter of the handbook takes a closer look at the two fundamental areas of messaging. Developing messages that:

- Convey who you are as an organization; and
- Powerfully express your issue.

As you approach your messaging, remember your audience will need to hear your messages repeatedly before those messages will break through the clutter of messages swirling around in the media and be absorbed by your audience. And that means your messages cannot or should not change very often.

Once again, at the end of this chapter, you will find a worksheet to assist you through the process of developing these kinds of messages. And, you'll note the worksheet includes those fundamental questions about the current situation that should influence the messages you develop. That is:

1. Who is currently delivering messages on your issues – and what are they saying?

2. Understanding your target audiences – and their level of awareness or engagement in your issues.

Step One – Conveying Who You Are

Messages for Your Organization

Within the context of any campaign, you should be clearly conveying who you are as an organization. This means purposefully developing three distinct levels of messages. Communication advisors use many different terms to describe these levels: for example, top-line, key, core, primary, secondary, positive point, talking point, tagline and slogan are a few. Here, we'll refer to them as a core message, key message and positive point. Your core and key messages are the constants. Positive points, on the other hand, change over time to express the specific issues you are addressing.

Your communication objectives and how many distinct audiences you aim to reach will help you determine how many messages you'll need. At the very least, however, there should be three: one core message, one key message and one positive point. Here's a closer look at each level.

1. Core Message. This is the one that reflects why your organization exists. You will have *just one* and it will inform every other message that you ever develop, regardless of the audience. This message is extremely important to define. (It can be a reframing of your mission statement, since it also defines why your organization exists.)

It should possess these three qualities. It should:

- Name your organization;
- Use an active verb; and
- Be general in nature.

For example, here is a core message that might be adopted by an environmental organization: TREE protects our wilderness now and for future generations.

2. Key Messages. Your key messages are the next level down and explain what it is you do as an organization to fulfill your mandate. By definition, you cannot develop your key messages until you have clearly stated your core message. You may have just one, or more depending on the nature of your organization and programming. These messages are, however, more specific than a core message. Again these key messages should name the organization and use an active verb. For example, here is a key message: TREE might develop to describe the specific activities in which they participate: TREE monitors the activities of logging companies.

3. Positive Points. At the third level are your organization's positive points. These messages are *your news*. They change to reflect the activities you are currently engaged in, whom you are trying to engage, and why you have, at this specific time, decided to reach out to the public. Each positive point should be targeted to appeal to the values of a *specific audience* you have determined is persuadable.

You will likely develop several positive points for each of your key messages. In the same way that well–developed key messages fall out of a well–defined core message, your positive points should support the intent of your key messages. Positive points have a number of qualities in common as well. They:

- Are more specific than a key message
- Appeal to a shared value or interest held by the target audience
- Are phrases that can follow their organization's key message
- Answer, in concrete terms, the question: what are we doing?

For example, here is a positive point that could support the organization's key message: TREE issues the annual Status of the Wilderness report to shame the logging companies that are degrading our forests.

What About Slogans or Tag Lines?

It is our natural tendency to create fun and memorable short phrases, taglines or slogans that are distinct from key messages or positive points, for use in our outreach materials. Taglines, or slogans, can be useful to develop as long they reinforce the real messages that have been crafted. For example: Coke: it's the real thing; or Nike: just do it, and, the environmental movement's: think globally, act locally!

Step Two – Messages Around Your Issues

Telling Your Stories

There are an infinite number of ways to communicate your issue. Again, what matters is identifying what will have meaning for *your* audiences. For example, you may want to protect your local watershed purely because it's beautiful, but if your target audience is Acme Corporation, you'll likely need to speak to their bottom line. Or if you're aiming to reach mothers in the local community, you may want to speak to their concerns about their family's health.

A Few Messaging Rules

- Speak directly to the key audience you aim to reach– Your messages, and your messengers, must speak their language and to their core values, attitudes, concerns and priorities.

  For example, messages aimed at business leaders should focus on making the economic case, building on themes of being "cutting-edge" or improving the bottom line. Messages aimed at senior citizens might focus on linking the environment and health or preserving a heritage for their grandchildren. And, messages aimed at women might focus on the intrinsic values of wilderness areas, while messages to men would reflect their concern with recreational access to those same areas.

- Be brief – A message may not be a whole sentence, let alone a paragraph! The shorter your message, the easier it is for the audience (and the speaker) to remember.

  For example, notice that the messages conveyed by large corporations are increasingly brief? In Nike's ads, for example, there are often no words at all– just a photograph and their logo at the bottom. Nike communicates their message through visuals that reflect the values of their target audience.

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It’s equally vital that your messages match your audience’s level of awareness or engagement in the issue. A campaign, for example, cannot effectively begin with a call to protest Bill C–10, if the audience has no idea what Bill C–10 is or why it matters to them!

This section of the handbook takes a closer look at how to develop effective messages – based on the key considerations that come into play at each of the four stages of engagement. As was elaborated in chapter one, to achieve success, it is vital that your messages match your audience’s level or lack of involvement, as follows:

- Stage 1: Awareness (no engagement)
- Stage 2: Attentiveness (but low engagement)
- Stage 3: Judgment (moderate engagement)
- Stage 4: Action (high engagement)

Stage 1: Getting Your Issue on the Agenda

Awareness Messages

If your issue is likely to be new to your key target audiences, in the early stages of your campaign, you need to focus simply on building their awareness–that is, on getting your issue onto the public agenda for long enough to allow people to learn about it.

Your story must stand out from the barrage of

- Be clear and simple – Many of us use verbal shorthand (certain acronyms, phrases and words) to refer to the complex processes or issues we work with. This “jargon,” however, is foreign to the general public. That’s why some organizations have learned to avoid words such as, for example, “watershed,” “overcut” and “biodiversity.” Most people don’t know what those terms mean.

For example, in a recent American opinion research poll, a middle-aged man summed his views on the term “biodiversity” this way: “It sounds like a government program, and I don’t want any part of it!”

What about Pushing the Envelope? The “Two-Year Rule”
While messages are most effective when they are based on language that is familiar, you may also wish to **judiciously** introduce new terms as part of a longer-term strategy.

As a general rule, it takes a **minimum** of two years of consistent communication around a new concept before it will be widely recognized and understood. Until the public’s understanding of the phrase or concept grows, as it will over time, you will need to ensure that you always provide an explanation.

For Example: Fifteen years ago, the Canadian public was completely unfamiliar with the terms “old growth” and ”clear cutting.” It took **years** of continuous communication and explanation by environmentalists, before the general public came to view these terms as reflecting core values. “Old growth” is now virtually synonymous with a precious resource to be protected and “clear cutting” is largely understood to be a negative form of forest harvesting.

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issues and information that fill the public agenda every day. The *real* objective behind the messages you deliver should be to generate sufficient emotional engagement in your issue that people start talking about it. But remember, too much information, too early, will only overwhelm your audience and end up in the recycling bin. Here's some advice:

1. Give your audience a reason to care – lead with values. Demonstrate how your issue *threatens* one or more of the environmental values that are *essential to them*. (A public opinion that is formed based on your audience's fundamental values is more likely to become embedded.)

2. Use imagery – help people *relate* to what's at stake. People need to relate to issues through their emotions before they'll listen to facts and logic. The most powerful route to your audience's emotions is to use images that are visual, sensory or symbolic.

3. Tell a story – give them something interesting to tell others. Environmental messages that are embedded in interesting stories get picked up by the media and are more likely to be passed on from citizen to citizen. Messages that get repeated get increased attention. Here are some key characteristics of a good story:
   - Dramatic: Stories that contain a struggle, conflict, or challenge that is overcome by a heroic person are engaging and can effectively illustrate a broader issue. (Consider too, featuring your

- Be compelling – We often avoid emotional language and qualify what we say with words like "may" and "sometimes." Don't do it! A good message is emphatic and evokes an emotional response. It speaks to a core value such as "individual freedom" (in some countries), or "collective responsibility" (in others), or to a potent concept such as "safeguarding our children's future."

  For example, the great speechmakers of our time – Mahatma Gandhi, Noam Chomsky, Mary Robinson, David Suzuki, Nelson Mandela, Helen Caldicott – are not afraid to evoke their audiences' passions. They understand the core values of their audiences, even as they speak from their own hearts – and we remember what they say.

- Be believable – Messages cannot be effective if they are not believable. And, when we believe in our messages, we can convey them with a conviction and passion that is more likely to cause our target audiences respond.

- Repeat, Repeat, Repeat – When your organization's spokesperson delivers a speech or gives a radio interview, the audience will usually remember no more than three key ideas afterward.

  The audience is more likely to remember a message if they've heard it at least three times within the preceding two weeks, if it is a "good" message (that is, it speaks to their values), and if it is delivered in a variety of way: concrete examples they can personally relate to, statistics, analogies, etc. Finally, they are especially likely to remember it if the spokesperson is confident, genuinely believes the message and carries some authority on the subject.

own heroes in your messages.) For example, the media frequently publish stories of young people making a heroic effort to save a park or wilderness area. Or, the struggle of an animal can draw wide media attention. Does your issue contain an element of struggle that could be used to illustrate the broader issue?

- Unique: People often feel they've heard it all before, so tell them something they haven't heard. For example, the natural environment, for example, is full of unique stories, from swimming wolves to sponge colonies that can be used to illustrate and make links to the broader issues.

- Ironic: An unexpected twist engages us and reminds us that things are not always the way they appear. Irony is particularly popular among younger audiences, and, used effectively, irony tells an audience that you respect their intelligence. But, a word of caution: though irony can be powerful, it can also be associated with cynicism and hopelessness so balance your use of irony with stories that point to solutions.

4. Use understatement – let others emote. People often listen more attentively when others talk quietly. Conversely they tend to filter more out when people are yelling. That's why audiences tend to become calm and rational when a highly emotional speaker is providing upsetting news, while becoming agitated when a calm, rational person provides upsetting news. By being emotionally understated in your delivery, you'll leave room for your audiences to be "shocked and dismayed."

Stage 2: Creating an Informed Audience

Attentive Messages

Now that your audiences are paying attention, they're ready for more in–depth information. This is the right time to deliver "attentive messages" that will increase their knowledge and understanding of your issue. Attentive messages must be repeated frequently for people to absorb greater depth of information. (Ideally your target audiences should hear the same message at least three times over a short period.) At this stage your messages should also:

1. Tell them something new. Many people believe they have "heard it all before," so the trick is to tell them something they haven't yet heard by telling the same story in a

different way. For example, in the late 1970s, many environmental groups tried to discourage the use of aerosol sprays by talking about the depletion of the ozone layer. Few people were taking any of this in – they didn't want to hear for the eight hundredth time, in the same way, that the ozone layer was being depleted. However, when environmental organizations started talking about a new angle on the story, the discovery that ozone depletion was manifesting itself as a hole over the earth's polar regions, the public started paying attention, and learning.

2. Give people another reason to repeat you – follow with facts. Once you have an audience's emotional attention, they're ready to hear the evidence. And they want to learn the facts and details so they can also tell others. Your messages should provide specific details and examples as often as possible without overwhelming your audience. Without evidence, we not only undermine our messages, but we undermine the people who repeat what we say.

3. Give people a reason to believe you – provide sources. Back up your assertions by providing an independently verifiable source. The most credible sources on environmental issues are scientists, especially independent academics, as well as people who are directly exposed to the issue (e.g. witnesses). Quote these people directly and provide them as references for further information on your issue.

Stage 3: Persuading People to Support Your Position

Judgment Messages

Once people have absorbed the facts, they will generally move toward taking a position. This process involves evaluating the tradeoffs, and confronting personal emotions and values. While some people can decide where they stand right from the start, others will remain undecided until they have a *reason* to take a position. This is most likely to happen when people feel they have a personal stake in an issue. Here are a few approaches:

1. Make it all here, now and personal – link the impacts directly to your audience.

   People are more likely to pay attention when the risks or costs of an issue will impact them personally. Focusing on these kinds of elements can also provide immediacy:

- The local angle: Messages are best linked to a place that people relate to through familiarity, stories or pictures. And be specific: referring to pesticide use in a specific park, or bad air quality in specific schools always has greater personal impact.
- Proximity: You can link your message to the issue by physically placing it where the issue occurs.
  - *For example, to communicate about the need for transit, connect with people stuck in traffic jams (via a billboard, radio message or leaflets.) Communicate with parents about the impact of air pollution on children at kids' events. At a boat show, tailor your messaging to reflect on wild salmon.*
- Urgency: Messages must seem to be of overwhelming and immediate importance; otherwise the audiences will put off making a judgment. Use timelines and dates to emphasize urgency, *and* use accessible imagery and language.
  - *For example, "There is a good chance that by the time kids born today graduate, there will be no more island marmot or Georgia Strait Coho salmon, and families will have to reserve two years in advance for a camping spot in a BC provincial park, like they do in Ontario."*
- Personal Impact: Provide "hooks" that make messages relevant to people's personal values or interests. And link the impacts to people's lives by referencing familiar experiences.
  - *For example, people are more likely to have choked on "car exhaust" than "air pollution" and they are more likely to know someone with asthma than "respiratory disease."*

2. Give them a reason to follow you – talk about the benefits for them. More than anything else, people want to be part of a positive future. So don't just focus on the negative impacts of your issue, highlight the positive personal benefits that are achieved by protecting the environment. (This is much like persuading someone to take a winter vacation to enjoy the sun, the sand and the good food, and not only to avoid the snow and rain.)

3. Link your position to core audience values. Frame your issue in language consistent with core values. Again, effective messages address fundamental values held by the general public.

4. Name–drop – let them know they are in good company. Use "morally credible" sources, as well as factually credible sources. A morally credible source can deliver a message of concern, not necessarily an endorsement of the facts. So, while Oprah may not be credible on the science of antibiotics in beef cattle, her concern about the issue swayed people and moved them to act.
   - Respected sources – remind people that others whose values they admire are also on side. People like to identify with other respected people.
   - Strength in numbers – people like to know that they are in the majority. So, use statistics whenever possible to assure people they are not alone in their views.

Stage 4: Move People to Solutions

Action Messages

Your audiences are concerned. It's time to help them act – to empower them within the confines of their busy lives. Don't continue to focus on building concern because you may actually *inhibit* action by reinforcing their sense of helplessness and intensifying their guilt.

1. Take advantage of existing behaviours – make action convenient. Letting people know that it is easy for them to act is vital–this means your action messages need to be located near the point of action.

   - *For example, a "please recycle" sign is most effective when placed near a recycling bin or by a spot where people read newspapers. A "please donate" sign is best placed on a donation jar where people are receiving change. Instant "fax–a–letter" or "click to donate" functions on a website are also clear examples of making action easy.*

> The space between guilt and action is referred to as a "guilt-gap."
>
> The home recycling bin is an effective answer to a guilt-gap that formed in the late 1980s where few people were recycling but most felt it was a good thing to do. Further guilt inducing campaigns focused on "concern" and "motivation" would not have increased participation in recycling at the time. The home recycling bin was a successful means of moving people to action because it gave a public that was ready to act something concrete to do.

2. Tell people how they can be part of the solution – provide specific direction.
   - Include specific prompts – focus on the "how." A message in a marina that

says "you are the solution to water pollution" doesn't specify what people need to do. Listing easy solutions and providing direction on where to find more information does. A message that says "Save the Great Bear Rainforest" needs to be accompanied by a prompt that tells people what to do to save it.

- Be positive – provide alternatives. A message that says what *not* to do is more effective when accompanied with alternatives on what to do.
  - *For example, telling sports fishers not to use lead weights is most useful when accompanied by opportunities for positive action – including, perhaps, the names of alternative products and a list of locations where they can purchase them.*

3. Show people what success looks like – inspire them. People want to be part of a winning solution. To take advantage of this natural tendency, aim to:
   - Provide a vision. Paint a picture of how things could be. By doing this, you force your opponents to "rain on the parade."
     - *For example, talk about how economic prosperity and protecting the natural environment are linked. Describe what specific industries will look like when they are well managed.*
   - Focus on results: Examples of success empower and inspire.
     - *For example, cite your own record of success and that of similar campaigns.*
   - Focus on people: Action messages can feature examples of people we can identify with – people like ourselves – who are having success creating change.

Worksheet #3: Steps to Developing Your Messages

This worksheet outlines the steps that are involved in developing the range of messages required for your organization and to express your issues.

Before You Get Started – Defining the Landscape

A Few Fundamentals

Naturally, your messages should be based on your clearly defined objectives and a clear sense of who are your target audiences. These items are explored in Chapters 2 and 3 of this handbook. You may want to bring these items forward below:

Your Objectives:

1. The objectives identified in your plan include:

    - Objective 1:
    - Objective 2:
    - Objective 3:

Your Target Audiences:

1. The Primary – A–List Audiences include:

    - Target audience #1 is:
        - *This audience's demographic features include:*
        - *Their stage of engagement (awareness, attentiveness, judgment, action) is:*
        - *Their stage of engagement is:*
        - *Their psychographics (attitudes, values, etc.) include:*

- *They get their information in the following ways:*

- ▶ Target audience #2 is:
  - *This audience's demographic features include:*
  - *Their stage of engagement is:*
  - *Their psychographics (attitudes, values, etc.) include:*
  - *They get their information in the following ways:*

- ▶ Target audience #3 is:
  - *This audience's demographic features include:*
  - *Their stage of engagement is:*
  - *Their psychographics (attitudes, values, etc.) include:*
  - *They get their information in the following ways:*

2. The Secondary – B–List Audiences include:
   - ▶ Target audience #1
   - ▶ Target audience #2
   - ▶ Target audience #3

The Messages that are Currently Influencing Opinion:

As you develop your own messages, it's worth considering the complementary and conflicting messages that your target audiences are currently receiving, from your allies and competitors, as well as through the media. Most important, consideration must be given to the messages that are being delivered by your opponents. These are the messages that you'll need to directly or indirectly counter.

Your Allies and Competition:

1. What potentially complementary messages are your allies and "competitors" delivering?
   -
   -
   -

2. What is the tone of their messages?

3. What positive–and negative–influence are their messages having?

The Media

1. How is the media covering – and not covering – your issue?

2. What messages are the media delivering?

Your Opponents:

1. What are those opposed to your group's perspective saying about the issue?

   What are they saying about your organization?

2. Consider your messages and theirs, and where they may be directly opposed.

Your Messages About the Issue	Their Messages About the Issue
▶	▶
▶	▶
▶	▶
▶	▶
Your Messages About Them	**Their Messages About You**
▶	▶
▶	▶
▶	▶
▶	▶

2. Make a list of your organization's – and your opposition's – strengths and weaknesses as messengers.

   Make your points mirror these wherever possible. (i.e. consider how your strengths may be their weaknesses, and your weaknesses may be their strengths.) For example:

Your Strengths	Your Weaknesses
▶ We are seen as credible and concerned messengers on issues of public health. ↓↓	▶ We are seen as less likely to care or know about the impacts of job–loss on local economies. ↓↓
Their Weaknesses	**Their Strengths**
▶ They are seen as willing to risk public health in order to increase financial profits.	▶ They are seen as providing local jobs and taxation revenue.

Your Strengths	Your Weaknesses
▶ ▶ ▶ ▶ ↓↓	▶ ▶ ▶ ▶ ↓↓
Their Weaknesses	**Their Strengths**
▶ ▶ ▶ ▶	▶ ▶ ▶ ▶

Messages for Your Organization

1. Set your message criteria

Think about what to capture, and what to avoid, in terms of both tone and language.

Consider also how your messages may be directly opposed to your opposition's message.

Tone to capture	*Tone to avoid*
▶	▶
▶	▶
▶	▶
▶	▶
Words to Capture	*Words to Avoid*
▶	▶
▶	▶
▶	▶
▶	▶

2. Craft your messages!

Now, roll up your sleeves and get creative! It can be useful to do this exercise in groups as a freewheeling brainstorm, and then to delete/add items in order to reflect the criteria you established earlier.

a. Your core message

Remember – you have only one core message. (Why do you exist?)

b. Your key messages

You can have several key messages to reflect each of your program areas. (What do you do?)

-
-
-
-

c. Your positive points

Choose one key message and develop positive points for each of your target audiences: what words and tone will appeal to their values? (What concrete, tangible things are you doing right now that you want people to know about?)

Key message #1:

Target audience:

- Positive point:

Target audience:

- Positive point:

Target audience:

- Positive point:

Key message #2:

Target audience:

- Positive point:

Target audience:

- Positive point:

Target audience:

- Positive point:

Key message #3:

Target audience:

- Positive point:

Target audience:

- Positive point:

Target audience:

- Positive point:

Key message #4:

Target audience:

- Positive point:

Target audience:

- Positive point:

Target audience:

- Positive point:

d. Your Slogans (the sky's the limit on these...)

Gather a group of people who reflect the values of your target audience and let them play with words! Then, test the slogans with another similar–minded group before you commit to using any message.

-
-
-
-

Step Two – Messages Around Your Issues

Telling Your Stories

This component of the worksheet focuses on developing effective messages at each of the four stages of engagement. Consider each of the potential approaches using the questions as a guide.

Stage 1: Getting Your Issue on the Agenda

Awareness Messages

At this stage, you're looking to get your issue onto the public agenda – and to deliver the kinds of emotional messages that will encourage your audience to pay attention long enough to learn about it.

1. Leading with values – giving your audience a reason to care.
   - Can you demonstrate how your issue threatens one or more of the environmental values that are essential to your audiences?

2. Using imagery – helping people *relate* to what's at stake.
   - What aspects of your issue (e.g. the impacts now and in the future) would appeal to your audience through their emotions?
   - Is there a compelling visual or sensory image or a compelling symbol that sums up your issue?

3. Telling a story – giving them something interesting to tell others.
   - Drama: is there a struggle, conflict, or challenge that is being overcome by a heroic person?
   - Unique: what can you tell people that they haven't heard before?
   - Ironic: is there an unexpected twist to your issue?

4. Using understatement – letting others emote.

- Is there a startling aspect to your issue that would be further emphasized through understatement?

Stage 2: Creating An Informed Audience

Attentive Messages

Now that your audiences are paying attention, they're ready for more in–depth information aimed at increasing their knowledge and understanding of your issue.

1. Telling your story in new ways.
   - How can you tell your story in a new and different way?

2. Giving people another reason to repeat you – follow with facts.
   - What evidence/proof – consider simple, specific details and examples that won't overwhelm your audience – can you provide?

3. Giving people a reason to believe you – provide sources.
   - What credible sources – scientists, especially independent academics, and people who are directly exposed to the issue (e.g. witnesses) – can you quote directly?

Stage 3: Persuading People to Support Your Position

Judgment Messages

Once people have absorbed the facts, they will generally move toward taking a position. This is most likely to happen when people feel they have a personal stake in an issue. Consider these approaches:

1. Making it all here, now and personal — link the impacts directly to your audience.

- Can you provide a local angle, and even better a specific location, for greater personal impact?

- Can you physically place your message where the issue occurs?

- Urgency: can you craft a message that makes your issue of overwhelming and immediate importance — for example, using timelines, dates and familiar imagery to emphasize urgency?

- Personal impact: can you link the impacts to people's daily lives by referencing familiar experiences?

2. Giving them a reason to follow you — talk about the benefits for them.
   - What are the positive personal benefits that are achieved by addressing your issue?

3. Linking your position to core audience values.
   - Frame your issue in language consistent with core values.

4. Name–dropping — let them know they are in good company.
   - Respected sources — what morally and factually credible sources can you quote to show people that others whose values they admire are also on side.

   - Strength in numbers — what statistics can you quote to assure people they are not alone in their views?

Action Messages

Your audiences are now concerned. It's time to help them to act. Remember, if you continue to focus on building concern, you may actually *inhibit* action by reinforcing their sense of helplessness and intensifying their guilt.

1. Taking advantage of existing behaviours – make action convenient.
   - Can you craft messages to be located near the point of action?

2. Telling people how they can be part of the solution – provide specific direction.
   - Include specific prompts – craft messages that focus on the "how."
   - Be positive – what alternatives to the negative (what not to do) can you provide?

3. Showing people what success looks like – Inspire them.
   - Provide a vision – how can you paint a picture of how things could be (while forcing your opponents to "rain on the parade")?
   - Focus on results – what successes (yours and those of other organizations) can you craft a message around?
   - Focus on people – what examples can we provide on people like "us" who are achieving success?

PART II
Focus on Tactics

5. Working with the Media

Developing your Media Savvy

There is no doubt that the media are an important and influential communication avenue, as is described in various chapters of this handbook. Whether you want to get your issue on the public agenda by reaching out to a significant segment of the public, or to illustrate to key decision-makers that public awareness is growing around your issue, working with the media will likely be an important component of your communications plan.

> Why work with the media?
>
> - The media are now people's main source of information about the issues – making it a primary education force in our society.
> - The media frame the public perception of the relative importance of the issues – through their focus on certain issues – and their exclusion of others.
> - Media set the public policy agenda – through the priorities they establish and their approaches to coverage.
> - These frames have consequences! They affect the work you are trying to do.

Working through the media also offers a range of other benefits. It can be a comparatively low-cost way to reach a large number of people. And achieving a media profile can also, for example, help you to build your reputation and credibility with your supporters, funders, and others.

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This chapter of the handbook focuses on how the media work. It also provides an overview of the range of communication tools and tactics, along with some important advice on how to handle your media relationships. At the end of this chapter, you'll find a number of tools designed to assist you to streamline your media activities.

Step One – Know How Editors Choose the News!

Understanding News Criteria

In crafting your media communications approach, and your individual stories, the first thing you need to consider is how editors define what "news" is. You'll need to tread the line between making your stories "fit" their requirements and ensuring that you are being true to the messages that you have defined. Here's a closer look:

1. First and foremost, editors ask "is it new?" News is about change, trends, new developments, events outside the norm, and information people don't know. Ask yourself:

   - What's new? What have you heard from your staff that made you say, "that's interesting, I didn't know that!" What research have you conducted recently? (If the topic was compelling enough to study, by definition your research should contain something new that the public may find interesting.)
   - What changes have occurred related to your issues? What changes have you heard are coming?
   - What new trends are you aware of? What trends are affecting the issues you work with? What is your organization doing now that is a shift from past work?

   Editors also assess a story in terms of how much space (or time) they feel it deserves and what frequency of coverage it might warrant. An issue that is deemed important will have "legs" (see the box on this page). This means editors view the story as interesting and complex enough to deserve coverage several times a month, as the issue develops, and until there is a "resolution" to the problem the story is about. Some stories are so hot that they are deemed to deserve daily coverage! If yours is an evolving story, it's worth

> Here are a few ways to give your story legs!
>
> - Suggest different approaches to the story. Think laterally. Offer a campaign leader for a profile story. Get a high-profile person to visit. Publicize the results of your recent poll. Invite the media to your public meeting. Offer an exclusive interview with a researcher.
> - Devise fresh angles that will allow you to reach editors and reporters outside the environment beat. For instance, consider the health aspects of the issue. What about tourism? Educational opportunities?
> - Offer little "nuggets" of news that can generate a little coverage. Did you find an interesting document in a freedom of information request? Has a politician shifted ground slightly on your issue?
> - Try issuing a news release on Sunday, always a slower news day.
> - But don't issue a news release with every twist and turn of your story. Editors are irritated when they feel an organization is trying to get more coverage for an issue than (they think) it deserves.

asking any editor you contact how much coverage they think your story or issue merits so that you can aim to make your releases and phone calls fit their needs.

2. Is it timely, or better yet, urgent? Typically, editors look for stories that *must* be reported *right now*. They don't want to know what happened last week; they want to know what is happening today or will happen in the immediate future. They are less interested in long-term repercussions and more interested in the impacts right now!

   - How can you demonstrate that there is an immediate impact to your news?

3. Is it relevant to our audiences? Editors are always looking for stories that affect the lives of ordinary people. They want to cover *real* people, not just officials and spokespersons. Another factor that makes for relevance is proximity: editors search for news that is close to home. Always look for ways to localize your stories. Ask yourself:

   - How and why does this issue matter to people? How are people in our community *affected*? What *tangible* impact does this issue have on people? To support this media leaning, try to find individuals who are willing to tell their story to the media.
   - How does your organization's work affect people's lives? How does your work benefit the community?

4. And, finally is it out of the ordinary? If your issue meets the first three criteria it should be covered. But consider why people are interested in the Royal Family and animals that perform bizarre stunts. Can you use this tendency to your advantage? Ask yourself:

   - Are there unusual features to your story?
   - Is there a personality you can enlist to attract media attention?

Your Media Strategies

While enlisting the media is a tactic, how you will approach the media warrants some strategic consideration. Here are some key questions to ask:

1. What kinds of media coverage will result in the greatest impact on the decision-makers on this issue?

   - Which kinds of media are important to reaching your audiences?
   - What angle or element of this story is key to convey?
   - What tone should you take?

2. Given the dimensions of your story, what is the best method for achieving media coverage? (For more information on this topic – see the Glossary of Media tactics, starting on page 100.)

   - A press conference?
     - *Is the issue big enough, complex enough and newsworthy enough?*
   - An "exclusive"?
     - *With whom?*
   - A media briefing?
     - *Should your story be delivered in a briefing, at your office, with specific reporters invited?*
   - An editorial board meeting?
     - *Should you meet with one or more particular media outlets?*
   - Paid Advertising?
     - *Does your story warrant investing in coverage; that is print, radio and/or TV advertising (assuming you have the resources to do so)?*

3. What are the potential weak points in your argument or story?

   - How can you address or minimize these factors?

4. When should your release be released?

- Do you have an internal deadline?
- How does it fit with other current events?
- What are current editorial priorities?

5. If a government official could be asked by the media to respond to your release, should you inform that official?

   - How much time will you give them?
     - *Remember that government offices have communications staff – and they may find it in their interest to undermine your message.*

6. Who are your opponents?

   - What do you anticipate their key messages will be in response to this release?
   - How will you respond?

Step Three – What Media Do You Need to Reach?

Your Media Lists

Up-to-date, comprehensive, and accurately targeted media lists are the backbone of every successful media effort. A list that includes the right media and contacts facilitates follow-up, saves the effort and expense involved in tracking down the right person, and helps ensure that you don't miss important opportunities for coverage.

As a starting point, it's useful to note that effective media lists are less about quantity and more about the quality of the contacts that they include. Obtaining coverage in one publication or program that is "on the mark" is far more valuable than achieving coverage in ten that aren't. And, naturally, there is very little merit in sending your story to media that don't cover your issues or reach your audiences at all!

Here is some basic advice on how to identify the kinds of media lists you may need to create, as well as some tips on how to develop and maintain your lists.

A. Identify the Lists You Might Need

Depending on the range of issues your organization addresses, and the activities you undertake, you may find that you need more than one media list. Key factors to consider include the nature of your story and the target audiences you aim to reach. Here are some basic questions to ask to determine the media lists you may need:

1. Who are your target audiences? Once again, the more specific you can be about your audiences, the better targeted will be your lists. It will ensure you include appropriate special interest publications and help you identify opportunities that you might not otherwise consider.

2. What is the geographic reach of your story? Is it a local, regional, provincial or national event, program or issue? Consider whether you can customize your story to directly address the geographic reach of the media you wish to include on your list, by including, for example, local spokespersons/experts or referring to the localized impacts of the issue you are addressing.

3. What's your story? What issues or angles does it encompass? Your campaign or story may include aspects of interest to publications and journalists outside the environmental media. Just remember, your materials should make it abundantly clear why the story should be of interest. It's also key, whenever you send a story to more than one editor or journalist at a publication, that there be distinct angles to the story.

   Can you usefully extend the reach of your story by including media that focus on, for example:

   - Business? Is it an issue that clearly affects the economy, or involves an industry or an individual corporation?
   - Features/Lifestyles? Does your story have a strong human-interest angle? Or, is it an issue that warrants an in-depth look?
   - Government/Politics? Does it address current government policies, practices or actions?

- Health/Health policy? Does the issue have health or medical implications? Does it have a health implication that government should be acting on or that you are requesting government to act on?
- Industry? Should certain industry professionals be alerted to the issue through the trade publications that they read? For example, energy, forestry, transportation, etc?

B. Keep Notes

As you make contact, keep personal notes with your media lists – ideally in database format – regarding:

- Your key contacts including their preferences, interests, etc.
- Approaches that worked with different programs and journalists.
- Publication deadlines. Different media have different "lead times" (deadlines for receiving information).

Step Four – Be Prepared to Talk!

Preparing Your Spokespersons

If you are going to undertake media activities, you must ensure that you have designated spokespersons that are equipped to speak on the issue and on behalf of your organization. These individuals must be both *available* and *fully prepared* to comment, whenever you send out a communication to the media.

A Word of Advice

Many organizations designate just one official spokesperson; however, it's often better to ensure that more than one person is prepared to speak to the media. You never know when a reporter might call, providing you with an opportunity for free publicity, and when reporters learn that you tend to be easily accessible, it becomes increasingly likely that they will call. If, on the other hand, your one "authorized" person tends not to be available, it leaves reporters with a negative impression.

- Encourage any staff that are comfortable and familiar with the issues to talk to the media.
- But, ensure that every person that speaks on behalf your organization is completely informed and practiced in delivering the key messages you are trying to communicate.

Designated spokespersons should ideally be accessible at their home or mobile phone numbers. (A pager is a good option. It's inexpensive and allows a level of privacy.)

And, naturally, your spokespeople must also fully understand why they are talking to a reporter – that is, what it is you are aiming to achieve. Here are the questions you, and your spokesperson, need to consider:

1. What are the outcomes you want from this interview?

- Are you aiming to inform, motivate, persuade, or entertain?
- What do you want to say in one minute or less?
  - *If you can't summarize your news in one minute, it's too complicated or lacks focus.*
- What are your top one to three messages?
  - *Ensure that you have prepared several clear, concise, positive statements.*

2. Why does this reporter want to talk to you?

- Preview the show or read the reporter's writing before you talk to him or her.
  - *Do some background research on the interviewer. Try to determine whether or not he or she has an "agenda."*
  - *If the interview is for media outside your area, call an ally who does have access to this station or paper to get this information.*

3. Know your subject intimately – forwards, backwards, and upside down.

- Do some background research.
  - *Gather timely and extensive data related to your issue.*
  - *Cite this evidence during the interview to back up your key points, sometimes data/research/statistics, sometimes-anecdotal evidence, but always something tangible.*
  - *Pre-empt your opponents by knowing what those who are against your position would say, and proactively addressing their points.*
  - *Offer to fax a background release or fact sheet containing this information; the reporter will more likely cite your data (and cite it accurately!)*
- Be truly interested in your subject.
  - *If the subject does not intrigue you, you won't get the reporter interested either.*
- Believe in what you are addressing.

- *If your statements don't convince you, you won't persuade the reporter, or their readers/listeners/viewers to support your position.*

4. Be prepared to answer two or three really tough questions.

- Develop a list of all those questions you hope won't be asked and be prepared to answer them.
  - *Ensure the answers you prepare are not defensive.*

5. If you don't know an answer, don't lie.

- Tell the reporter you don't know the answer, but that you can get it.
  - *It's perfectly legitimate to tell a reporter that you don't have those facts but that you'll get right back to them with the information they want.*
- Or, provide the reporter with a contact who does know the answer.
  - *She or he will remember you as a cooperative and reliable source.*

6. Rehearse your delivery.

- Words written on paper often do not translate well when spoken.
  - *Practice your answers out loud to the mirror, to colleagues and friends.*
- Practice "bridging" – this is key! You have an agenda (key messages you aim to deliver) that don't necessarily match the reporter's reason for the interview. Practice inserting those messages into your answers to a reporter's question.
  - *In answering a question about the past, incorporate facts about the present. Answer a question that would require you to make assumptions with an answer that addresses the facts. Bridge off a question that is irrelevant by incorporating a message that addresses your own agenda.*
- Practice keeping your answers short – this is key.
  - *For live broadcast interviews, your spokesperson should practice keeping answers to about 20 seconds. Time delivery with a stopwatch. You'll be surprised how quickly 20 seconds goes by, yet it's a long time on radio or television.*
  - *For pre-taped interviews, sound bites rarely run beyond 15 seconds, 10.2 seconds is average.*
  - *Talk in sound bites – that is, keep your answers short and do not over-answer.*
  - *Avoid acronyms, jargon and technical terms: remember who your audience is.*

- Use your organization’s name, never “we” or “I.”

7. Know these tips for broadcast interviews.

- Smile, sit erect, use simple hand gestures, and maintain open body language.
  - *This positively affects your delivery, even on radio.*
- Use the interviewer’s name once near the beginning of the interview.
- Project energy.
- Maintain eye contact – not “camera contact.”
- For television, dress conservatively.
  - *Don't distract the viewer from your message by outlandish dress, unless of course that's part of your message.*
  - *Subdued "cool" colours lend a sense of authority; bright colours can make you seem less serious.*
  - *Don't wear stripes or small patterns as they go fuzzy on screen.*
- If it's a studio interview, arrive early so you can get make-up applied.
- If it's a field interview, ask if it can be conducted somewhere that supports your message:
  - *For example, under a tree if it's about logging, or in a park if it’s about urban green spaces.*
  - *Try to avoid "behind-the-desk" interviews unless you want to look like a bureaucrat.*

8. Plus, know these tips for print interviews.

- Pay attention to how the interviewer paraphrases you.
  - *Correct him/her if necessary.*
- Take time to clarify or elaborate.
- Offer to follow-up with additional information.
  - *Supply photos if possible.*

Advice for Handling Specific Situations

If you begin to develop a media profile, the media may begin to call you. Here is some advice for handling some key situations.

A. If a Reporter Calls and Catches You Unprepared

1. Find out what the story is about.

   - Is it a general issue you are competent to comment on?
     - *If you are, go ahead: it's free advertising for your organization.*
     - *If you're not, politely turn them down, but use this opportunity to educate the reporter about what your organization does.*
   - Is it a story that is directly related to your organization?
     - *Consider whether the story will raise your profile and whether it could damage you before you talk.*

2. Ask for time.

   - Don't hesitate to say you need time to get a handle on the issue, consult with others in your organization, your board, experts, and so on.
   - Determine the reporter's deadline and get back to him or her that time.
     - *If you opt to decline, let the reporter know so that he or she can find an alternative speaker.*

3. Prepare your answers.

   - Consider what you want to get out of the coverage.
     - *Strengthen your story elements to make sure you achieve the profile you want from this free advertising.*

4. Call the reporter back.

   - Be aware that she or he probably already has a story focus.

- *Your responses may be heavily edited and/or be peripheral to the story.*

▶ Regardless of whether you said you'd call back, do.

- *This cannot be emphasized enough. In building relationships, every call, or broken promise, impacts your credibility and reputation with the media.*

5. Be appreciative and helpful when reporters call.

▶ Again, you're developing relationships.

- *Can you refer them to someone else for a quote? Can you comment on just one portion of the story?*

B. If You've Been Misrepresented

1. Consider how serious the error is and whether you wish to address it.

2. If you decide to address the misrepresentation, decide on what outcome you need to seek.

▶ If it's really bad, you need to ask for a correction.

- *In this case you need to speak to the editor of the publication, or the producer of the program.*

▶ If it's not, contact the reporter to alert them to the error.

- *Call at a time of day when the reporter is less likely to be busy.*
- *Use it as an opportunity to educate and build relationships. You might even get another story out of it.*

▶ If it's on radio, call right away!

- *The story will likely run more than once and you want to stop repetition of the error.*

C. If Reporters are Calling to Cover Bad News About Your Organization

In this case, you need to be able to defuse the situation.

1. Decide what you *can* and *can't* discuss.

   - Make the information you can discuss available as soon as possible.
     - *Be available to provide some details. This will go a long way to reducing the appearance of avoiding the media.*

   - Have a legitimate rationale for the parts you can't discuss.
     - *Say "it's under investigation; I don't have the facts right now," etc. Calmly reiterate this rationale if you are pressed.*

2. Maintain control.

   - Avoid engaging in speculation.
     - *Keep your cool.*

3. Look for ways to turn bad news into good coverage.

   - The way you handle this "crisis" or bad news can say a lot about your organization. Project a responsible attitude. Take responsibility, or express your concern or regret where warranted.
     - *You may develop a solid relationship with reporters, based on how you handle this issue.*

D. When There's Bad News About Your Organization and Reporters are NOT Calling.

If negative news is being reported, and reporters are not calling, you need to decide whether you want to try to alter the perception that has been created. If the answer is yes, act quickly.

1. Get a media release or some sort of response out quickly.

   - This should go out the same day the story first appears.

- *Make it clear in your release and phone calls that you are at the centre of the story; in other words, balanced news coverage about you requires that you be heard.*

▶ Answer what you can and hold off on the rest.

- *Mitigate any damage, and open the door to further communication.*

2. Use this as an opportunity to build relationships and educate about your organization.

▶ Call the reporters who have covered the story and ask them why they have not called you.

- *Tell them you feel this was a misrepresentation of the story and educate them about your organization or issue.*
- *If they are unresponsive, call their editors and ask why you were not called.*
- *Stand your ground but be questioning rather than critical. ("I'd like to understand why you didn't call; I believe you should balance this story with a follow up story that includes our point of view..." rather than, "Your journalism sucks.")*
- *Remember, you are building relationships.*

▶ Make sure your media material contains basic background about you.

A Glossary of Media Tactics

What, When, and How to Use Them

Over the pages that follow you'll find a reference guide to a range of media options you can consider in deciding your best media approach.

Advertising – Newspaper, Radio & TV

A paid advertisement (placed where your target audiences get their news).

▶ What does it do? It allows you to deliver your message in your words, particularly when "earned media" aren't delivering it. It also helps to create a profile for your organization or issue in the mainstream press.

A provocative ad can also motivate the news media to pick up your issue. Both environmentalists and health advocacy organizations have successfully raised their news coverage by running well-placed ads in newspapers and on radio.

See also the section on Public Service Announcements for notes about free advertising opportunities.

- When do I use it? Paid advertising is best used when you want to mobilize a large group of people to take a specific action, such as to send a letter to a politician. Remember, ads can be expensive, a number of exposures are usually required for people to register your message, and success is difficult to evaluate.

- How do I do it? Plan your advertising from the start, within your overall media or communications strategy. All too often, groups resort to ads when their other outreach approaches have failed. These messages are rarely well developed and often there is not enough time for the message to fully penetrate the target audience. (For example, in radio, it is standard to run *40* ads in a one-week period to ensure each listener hears your message more than once).

  For more on this topic, see Chapter 6 – Producing Effective Print Materials.

Columnist

A newspaper staff writer who contributes opinion pieces about timely issues.

- What can she or he do? A columnist can provide an additional avenue for coverage, with the added bonus that she or he can support your position.

- When do I use her or him? If you don't have hard news, or if the editorial staff don't share your point of view, a columnist who shares your values, or position on other subjects, may also be an ally on your issue.

- How do I use her or him? Call the columnist. Introduce yourself and your story idea, with an emphasis on why the issue is important, and why it would make a good column.

Gimmick & A Non-news Item

A visual, funny and/or provocative element that creates a hook.

- **What can it do?** It can draw the media's attention to a story that you have been unable to "sell." It can also make up for a lack of hard news content, generating coverage by virtue of its quirkiness. Television news producers, in particular, like to "balance" hard, serious stories with softer, more colourful ones. (Gimmicks might include outlandish costumes or props, a stunt of some kind, or a "teaser" campaign that arouses curiosity.)

- **When to use it?** *Only* when the gimmick or item is both relevant to your issue and innovative or crazy enough to attract media attention, *and* when you'll be happy with superficial or spot coverage, as opposed to an in-depth discussion of complex issues. If your timing is right, and your hook original enough, you could benefit.

- **How to do it?** It depends on the gimmick. If it's not visual, but it's funny and lends itself to disc jockey patter, you might make the rounds of the morning or afternoon drive shows on local radio stations. If it's a once-only stunt that you want TV cameras to come out for, pick a time when they're least likely to be occupied and send a teaser or two in advance. (Give enough information in the teaser to persuade them it will be worthwhile.)

  Never send a gimmick to a news reporter. The best targets for gimmicks are the soft news sections of the paper (food, fashion, and new homes), and the morning and drive shows on radio.

Editorial Board Meeting

A meeting with a newspaper's key decision-makers.

- **What does it do?** It allows you to present your organization's viewpoint, in person, to a newspaper's editors and to raise their awareness and understanding of your issues. These one-on-one sessions also help you to develop personal relationships, and to build your own and your organization's credibility as a key source of information.

- **When do I use it?** At the beginning of your media campaign to increase your odds of achieving your media goals. Through these meetings, you will likely learn what aspects of the issue the editors find most interesting, and what angles and approaches they would apply to your story.

  In general, it is also best to approach an editorial board when you are not in a defensive position. Your tone will be friendlier, and the media will be more willing to invite you to speak if they know your aim is to provide information, not to berate them for their "poor coverage."

- **How to do it?** Call the editorial page editor to request a meeting. Establish how much time you will have, as well as how many editors and reporters will be present. At the meeting, present your perspective in a professional and informative manner. Don't be angry or condescending. Your aim is to establish your credibility and expertise, not to marginalize yourself as a crank!

  Be prepared for tough questions. They will ask you difficult questions, perhaps even play devil's advocate – it's their job to test the validity of your position.

  Know how the paper has been covering the issue and know whether or not they are running an article on the day you meet with them!

Letter to the Editor

A letter commenting on a current news story being addressed by the paper.

- **What does it do?** Letters to the editor appear on the op-ed pages and are one of the most read segments of the paper. Like an op-ed, letters allow you to present your position with minimal mediation by the paper itself. (In practice, this requires you to keep the letter as concise as possible, since all papers reserve the right to edit letters for brevity.)

- **When to use it?** When you want to comment on a current story and/or its coverage without mediation and an op-ed piece isn't warranted (because you don't have enough to say, or you don't think they'll print an op-ed piece from you, or you don't have enough time to research and write one). Your letter may criticize some aspect of the paper's coverage or add context to a particular story. It may also respond to a previously published letter.

- How to do it? Note the usual length of letters to the editor in the publication you are addressing and stay within those boundaries to avoid having your comments cut. If you *must* criticize the publication, do so calmly and objectively. Back up your claims with facts and concrete examples. (Don't forget to sign the letter and provide the publication with your name and address, otherwise they will generally not publish the letter.)

  Don't overdo it. People who write more than once a month are dismissed as crackpots. And remember, expressing yourself angrily can sometimes undermine your credibility and position you as a crank.

Media Briefing

A meeting to inform reporters about your issue area.

- What can it do? Like editorial board meetings, a briefing allows you to inform the media about your issue and to build your credibility and relationships. (It's easier to say 'no' to someone you've never met.) Unlike editorial board meetings, briefings are aimed at reporters, not editors, and typically they include reporters from a variety of media, including TV and radio.

- When do I use it? Media briefings are useful at the beginning of a campaign, at regular intervals during a long campaign, and when you perceive that the media does not fully understand the complexities of your issue.

- How to do it? Media briefings are usually held in your office, not at a media outlet. Try to get a group of six to ten journalists to attend. Call the reporter you know best first. If he or she agrees to attend, call others. Prepare a Media Kit for each reporter. Bring in experts if they can add to your presentation. Keep your presentation concise and leave ample opportunity for the reporters to ask questions. (Provide food and drink, but don't go overboard!)

Consider media training. If you don’t have a great deal of media experience it will help you to ensure you deliver your key messages and prepare you for difficult questions.

Media Call

A phone call to pitch a story idea or to follow-up a news release.

- What does it do? Media calls let journalists know that you have a story they may want to cover. Media calls also help you develop important relationships with reporters, establishing a presence for your organization in their minds and in their files.

- When do I use it? There are a number of strategies. Some organizations call reporters, columnists, editors every month or so, to update them on relevant changes in the issues. Others only call the press when actively promoting a story. Some organizations never call the press – they should!

  Even if you don’t have a story to pitch, reporters who are interested in your issue appreciate being kept up-to-date. This contact helps you build your credibility as a source, not just an organization looking for free media coverage.

  At the very least, every time you issue a news release, you should make a quick follow up call to key editors – to see if they are interested, if you can add any more details, or to arrange an interview for a reporter. It is amazing how often this additional step results in a story.

- How to do it? The very first rule is don’t launch into your pitch until you establish that your contact has the time to speak with you. Ask, “have I got you on deadline?” If so, arrange a time to call back – and stick to it. (Every contact you have with the media establishes your reputation as either a reliable, professional and credible source, or not!)

  When an editor says he or she isn’t interested, find out why not. Be polite, not indignant. Sometimes it's just timing, a busy news day, or a perception that your news isn't new. Say that you'd like to know why so that you can pitch them better stories in the future and avoid pitching them ones they don't care about. This will provide invaluable insight into the way this editor thinks, and will help enhance your relationship with the media outlet.

Be careful with follow-up phone calls to big media outlets. They get dozens of releases a day. Don't ask, "Did you get the news release I sent you?" Try "we sent you a news release about this topic; it's important (newsworthy) because… are you interested in doing a story?"

Consider offering the story to one reporter. If your news idea doesn't warrant a news conference, a reporter might be persuaded to cover it if you tell him/her that you haven't told anyone else about it. (Don't call it a "scoop" or "exclusive" as these terms are overused.)

Media Kit

A package of information designed specifically for media.

- What does it do? It provides editors, producers and reporters with your news, plus detailed background information. It provides you with an opportunity to educate the media about your issue in a non-confrontational manner.

- When do I use it? Hand out press kits to all the media who attend your news conferences. Provide kits to the individuals who attend your editorial board meetings. Send kits to reporters who express interest when you make your follow-up media calls.

- How do I do it? Select two or three messages that you want the media to repeat and include only information that is relevant to those messages: don't include every piece of printed material that exists about your organization or issue area. Ensure that your organization's contact details are on every page that is included in the media kit.

- What should I include? In addition to the news release (see News Release, page 110), media kits generally include a combination of the items described below. The asterisked (*) items are most important.
  - A Backgrounder or Fact Sheet (maximum two pages)*

This is usually a bulleted summary of the key facts and is designed to provide reporters with relevant additional background on an issue. It can also include expert contacts and opposition contacts to help the reporter do his/her job.

- *Incorporate titles/subheads to allow reporters to quickly scan*
- *Include a line or two about your organization*
- *Include your web address and contact information at the bottom*

▲ Charts, Visuals And Photographs *

For print and television, include these elements whenever possible:

- *Photographs of your spokespeople are always valuable. If you have several spokespeople and cost is a consideration, provide a single sheet of thumbnail images of each photo. Make it clear to the media that you can provide digital or original photos.*
- *Charts and other visuals are an effective method for illustrating scientific data. People not only understand graphs and charts more easily than text, it has been shown that they increase belief in your data by as much as 25%.*

▲ Frequently Asked Questions (FAQ) / Question and Answer (Q&A) sheets

An FAQ sheet answers the questions you receive on a regular basis or that you anticipate the media will ask.

- *Phrase each question succinctly to allow rapid scanning.*
- *Include a line or two about your organization.*
- *Include your web address and contact information at the bottom.*

Always prepare an FAQ sheet for internal use. Providing your spokespersons with this document plus a half-page of "talking points," will ensure they are prepared for media enquiries and interviews and help ensure that they stay "on-message." Your *internal* FAQs should include responses to any "tough" questions you think the media may ask. (Naturally, the FAQ sheet for your media kit should *not* include those questions!)

▲ Key Interview Contacts (maximum one page)*

This is a list of the most compelling spokespeople for your organization or issues, and the most compelling storytellers to back up your main messages/arguments. For example, if your position is that kids need exposure to natural places close to the city, you might include the name of an elementary school teacher who could be interviewed while doing a nature walk with young kids...

- *Include very brief bios – 50 words maximum – outlining each spokesperson's credentials (why that person is the most credible or compelling story-teller on which to build a media story.)*

- *Include home phone numbers, cell numbers, emails and other contact information, not just office numbers (if the spokespeople agree).*
- *Always include a paragraph about the organization with web address and contact information.*

▲ Additional options. You can also include one or more of these items in your media kit:

- *A very brief history/chronology of the issue (1 page maximum)*
- *A description of your organization (1 page maximum)*
- *Quotes or comments by experts and contact details (1 page maximum)*
- *Selected press clippings (3 or less)*

Media List

A list of every media contact you would want to tell about your news, along with their addresses and numbers.

▶ What does it do? It allows you to react quickly to news opportunities.

▶ How to do it? If you can, use a database format that allows you to keep notes on contacts you, and others in your organization, have with the media. Keep track of reporters' stories that relate to your issue area. If you don't use your list regularly, ensure it's updated every six months or so, so that when you need to react to news, you have a reasonably accurate list.

News Conference

An event aimed at bringing together all the media that you would like to inform about your news.

▶ What does it do? It brings the media and your spokesperson(s) together in one place at the same time. If there is controversy of any kind in your news, a news conference makes direct dialogue simple.

▶ When do I use it? When you are certain that your announcement has important hard news value, and that news can't be imparted in a news release. A news conference is helpful when your issues are complex and/or several people need to speak.

News conferences can take a great deal of time and energy to pull off. They are also a gamble, as you can't ensure the media will attend. Finally, they can be expensive, but they don't have to be. Conduct your news conference at your office instead of renting a conference room at a hotel. Better still, conduct it "on location," at a site that relates to your issue. TV will be more likely to give time to what you say if you say it in front of a visually interesting and relevant backdrop.

- How do I do it? Send the media an Advisory up to a week before your news conference and then again the morning of the event. Follow-up with a news release that highlights your story, provides a strong quote from your spokesperson, and supplies conference details. (Include enough information to show you have a credible story, but not so much that there's no need to attend.) Two days before the conference, call the media you've sent material to. Be prepared to resend the press release – many will not have seen it. On the day of the event, provide the media with a full Media Kit, containing the key details, contact names, bios and photos of spokespeople.

The best time to hold a media conference is mid-morning or early afternoon, and no later than 2 pm if you can help it. If you hope it will encourage follow-up stories, never release late in the day or late in the week.

Consider a strategic leak. If your news is big enough, consider leaking some aspect of it to *one* newspaper the day before, so that it appears as an "exclusive" on the morning of your news conference; or to *one* radio station a few hours before the news conference. Done properly, this will encourage widespread coverage. (Don't always favour the same outlet as you risk alienating the others.)

Ensure the reporter knows they are getting an exclusive (just don't use this worn-out term) and don't give away the whole story or there will be nothing left for others to report the next day. For example, if you're releasing a report, only provide some key findings, just enough for them to write a 300-word story or do a 30-second news item.

Your entire event should be 45 minutes or less including presentations and ensuring that you allow plenty of time for the media's questions. You should keep each presentation short (one to two minutes) and be prepared to arrange individual interviews following the conference.

Do have more than one speaker – but not *too* many – and ensure each fills a distinct role. You may want to include, for example: your spokesperson, an expert, and a person suffering from the impacts of the issue. Media are always keen to interview "ordinary" people who are affected by the news. Ensure each is an effective speaker, a genuine expert on your issue (where positioned as such) and that each can provide an interesting perspective on the topic.

Avoid placing your presentation area against a window. It's a poor backdrop for photo and video.

Provide a good sound system or a place to set microphones and ensure each speaker trades places, if necessary, to be in front of the microphone when they speak.

Have the media sign in. Follow up with reporters who did not attend.

Monitor coverage and evaluate success of the press conference in relation to the time, energy and money it took to hold.

News Release / Media Release / Press Release

A document that outlines, ideally in one page, the news you would like the media to cover.

- What does it do? It tells the media your story.

- When do I use it? When you have something newsworthy to tell people. When something has changed that people will want to know about.

Issue news releases early in the day, between 8 and 9 am, so that assignment editors can consider it and reporters have time to do a thorough job.

Don't issue your release if a major news event is breaking in your community, unless your release can't be delayed. Hold off a day or so to ensure it doesn't get buried or overlooked. (Read the morning paper and listen to the radio news BEFORE you issue the release.)

- How do I do it? Make sure your story is told in the first sentence. Emphasize anything new, active, focused on people, and having broad impact. Write a headline that can help grab attention. Write in the active voice. Keep the release to one page and make sure you include contact details.

  Your distribution approach depends on a number of factors. How you approach distributing your news release will depend on the nature of your news, your media strategy, and the relationships you have developed with the media and target audiences. You can either "broadcast fax" your release to every reporter or media outlet in town, and hope that one will pick up your piece, or you can target the release to specific reporters, from one (an exclusive) to any who you've noticed have an interest in your issue area.

- The Advisory. This is a one or two paragraph release that is faxed to reporters and wire services days before an event.
  - *Since it's used by Assignment Editors, include only the basic information, as follows:*
    - *What:*
    - *Where:*
    - *When:*
    - *Who:*
  - *And why: a couple of sentences that make the event sound compelling enough to cover.*
  - *Follow up with a phone call. This is an effective way to get media to your event.*

- The Action Release
  - *Say what you did and why in the lead paragraph.*
  - *Give lots of specifics, such as the number of participants, the message on a banner.*
  - *If the release goes out after the action, include details such as arrests with names and charges, scheduled hearings etc.*
  - *Include background information to substantiate your position and details of your campaign efforts prior to the action.*
  - *Offer solutions to the problem.*

- **The Reaction Release.** A reaction release contains your immediate response to a story that has appeared in the news. Generally it's very short and simply provides journalists with balance for their stories. This is an effective way to get a mention or quote into news stories about issues on which you work. To use this method well, however, you must read and listen to news every evening and morning.
  - *You must be prepared to respond IMMEDIATELY, while the story is breaking.*
  - *Focus on presenting pertinent quotes that express your position.*

- **The Study Release.** This is a straightforward document you distribute in conjunction with a report or study.
  - *It should summarize salient points of the report so that a reporter does not have to read the entire report to understand the conclusions.*
  - *It must be written in plain English – no tech talk allowed!*

Your Letterhead

NEWS RELEASE

Headline: People Taking an Action for a Reason.

(Say what the news is in as few words as possible.)

For Immediate Release

<Date>

<City> The Lead encapsulates what you intend to say: the who, what, why, where, how and when. You must capture the editor's attention here, as this is the one paragraph that they are sure to read. It should not exceed two sentences or six lines.

The Second Paragraph provides the details and context for what you announced in the Lead, in the same order. It contains the substance of the release: the complete story and most newsworthy details. If a prominent figure or government department has done something untoward, state your source here. If you are releasing new statistics or a report, state the findings here.

The Third Paragraph quotes your spokesperson, providing his/her *compelling* opinion or reaction to what has been released. Be very careful with your quote(s) because they may be pulled out of the context provided by your release and used by the reporter independently, to precede or follow a line of thought that you can't anticipate. The quote(s) should also make sense as a stand-alone. For example, "I'm appalled," said Mr. X is not as useful as "I'm appalled that the Mayor does not support…."

The Conclusion can either restate what was said in the Lead or can add an interesting detail which is not essential to the story, but adds a context which makes the reader think, "hmm, how interesting."

The Fifth Paragraph would be used if an event will be held in relation to the release. Indicate all relevant details: where, when, cost, RSVP required, number to call for more details, etc.

- 30 -

For additional information or to arrange interviews please contact:

Spokesperson's Name, Title, phone number

Alternate Contact Name, title, and phone number

Op-Ed

A commentary that appears on the Op-Ed page (opposite the editorial page) in the newspaper.

- What does it do? It allows you to present your unmediated perspective on an issue. A reporter, who is interpreting your views in the context of a news story, usually includes other sources and uses your comments only selectively, often editing or juxtaposing them in ways that don't serve your interests. This material is also distinguished from news articles in that it is not required to be "objective" or neutral, but is allowed, indeed expected, to embody the author's personal (albeit informed) opinions.

  Having your views published on the op-ed pages, which are usually read by those people in a community who wield influence, confers a certain degree of prestige and legitimacy.

- When to use it? When you have an informed perspective on an issue that is currently or about to be in the news. When you want to present an in-depth or complex analysis of a situation without your analysis being mediated by the reporter. When you want to build profile of your issue and raise awareness of aspects of the issue that are not being discussed fully elsewhere. Or, when you think it's important to go on record providing an alternative perspective to the ones currently dominating the press coverage.

- How to do it? If you already have a relationship with the newspaper and/or the person who edits the op-ed pages, you might want to call first and indicate that you have a key perspective that you'd like to submit as an opinion piece. This allows you to find out if they're likely to run it, and/or to convince them to retain space for it, to find out the length they'd prefer and when they need it by. If you don't want to call first for whatever reason, you can simply submit your piece with a brief cover note and keep your fingers crossed.

Photo Release

An arresting photograph that tells a story and features a person and/or event that wouldn't otherwise be available to the newspaper but that might be of relevance and interest to its readers.

- **What does it do?** A really great photo can draw attention to your event or issue. And it can compensate if a newspaper did not deem your event worthy of sending a photographer. If your photo is engaging enough, a story that might otherwise be buried on page C12 story might even become a section cover story, kicked off by your photo.

- **When do I use it?** Whenever a news event or issue provides a visually arresting image (something that embodies drama, surprise or human interest, for instance), or features a celebrity. When it would provoke use even by a newspaper that didn't warrant your event worthy of a photographer (or a reporter).

- **How do I do it?** Ensure your photograph is of professional quality. Attach to it, with tape, a lively caption (cut line) that explains the significance of the photograph. Clearly identify who's in it, and when and where it was taken. Also credit the photographer who took the photo.

Public Service Announcement (PSA) – for Radio & Television

Free advertising!

- **What does it do?** A PSA can help you to publicize your events, issues and services. The only hitch is that since they are free, you have little or no control over when or how frequently they are printed or broadcast.

- **When do I use it?** Whenever you have an event you want the public to know about. Often, a clever TV PSA that simply introduces you without referencing a specific date, can run dozens of times over months or even years. For example: OXFAM Canada's series of three 15 and 30-second PSAs featuring two famous Canadian comics (Mary Walsh and Cathy Jones) have run on CBC TV for a number of years.

- **How do I do it?** Call the advertising departments at various media outlets to find out their policies, lengths, and timing. For broadcast, 15 and 30-second pieces are the general rule. Contact your local community television station to see if they could assist in producing a TV PSA. Many radio stations will produce PSAs free of charge since they are obliged by their Canadian Radio and Television Commission license to broadcast a minimum number of PSAs each month.

Research

Original research conducted by or on behalf of your organization

- What does it do? It provides a news hook – if it addresses a matter of public interest, is methodologically sound (and is seen as unbiased), and especially if it uncovers data that challenges current perceptions. It also helps establish your credibility (because research usually entails expense and expertise, producing a study demonstrates that you have funds, expertise, and/or alliances with experts).

- When to use it? When there are important questions about some aspect of your issue, and you can afford to conduct the research that will answer those questions. When the general public is very supportive of your position and you have reason to believe that your opponents and/or the news media do not believe your issue is important.

- How to do it? First, consider whether or not undertaking this research will generate the publicity you seek. Do some strategic planning to ensure your research focuses on issues or uncovers information that will be viewed as newsworthy. Your research results may warrant a news conference, if they are groundbreaking enough and especially if you can involve independent experts.

  If your results are likely to be viewed as suspect, for example, because you're seen as "special interest group" with an axe to grind, you must ensure you can defend the validity of the research. Have a credible, independent body conduct it for you, for instance.

  If you don't have the resources to conduct your own research, it is sometimes possible to make use of recent research undertaken by another organization, if that research has not already received media coverage.

Staged Events – A Rally, Public Demonstration, Fundraiser

A planned "happening" that allows you to promote your issue.

- What does it do? It allows you and your supporters to state your position, to draw attention to an issue that is being ignored, and (ideally) to gather more support. You could be aiming for greater general awareness, or you may want to reach just one elected official by showing them that her or his constituency supports the action you want the official to take.

One type (a rally, a public demonstration) endeavours to bring a large portion of the public out to show mass support. Another type of staged event (a sit-in, a vigil) aims to draw the media's attention to the efforts of fewer people.

- When do I use it? Staged events, like news conferences, are risky (you won't illustrate broad support, for example, if only thirty people show up at your rally). Because these events are not usually news, they must always be pegged or hooked to something that is, such as a new report about the issue.

- How do I do it? Try to work in coalition with other groups that support your position. Plan well in advance and ensure that the event is well managed. Remember, one aggressive volunteer or protester could draw the media attention to the wrong story, send the wrong message to opinion leaders and policy-makers about your goals, and negatively impact your reputation.

  Sundays are usually your best bet. Hold your event on a day when you can expect the largest number of people and the most media coverage.

Video News Release (VNR)

A tape of broadcast-quality images for television news broadcasts.

- What does it do? It provides the media with the images you would like them to use to represent your story. It may, for example, provide them with images of "remote" areas that they otherwise would not have the budget or time to photograph themselves. A VNR can also make an otherwise non-visual story a TV news piece. If, for instance you release a report on the state of bear habitats in northern Ontario, images of bears in that habitat would improve your chance of making the television news.

- When do I use it? When media can't (or won't) send cameras to cover your story.

- How do I do it? Your VNR can be as simple as four minutes of unedited raw footage, or up to three minutes of edited material. (Most TV stations prefer to receive ¾ inch tape of raw footage that they can edit themselves.)

Make sure it's high quality. Generally, TV news stations will not broadcast video shot on home cameras, as the quality simply isn't good enough. This is not a cheap way to get TV news coverage, but if you have a great visual it may be worth the investment.

Approach your local cable station. Ask if one of their crews or independent producers would be able to shoot the footage you need.

Worksheet #4: Preparing for Interviews

Interview Checklists

A. Pre-Interview Checklist

Before the interview, it is worthwhile to take some time to prepare – to ensure you are ready both for the reporter's questions and to deliver your key messages. See if you can answer each of the following questions:

1. Who is the interviewer?
   - What is his/her name?
   - What is his/her area of interest?
   - What does this reporter usually write about? Is this his/her "beat?"
   - Can I expect him/her to be positive or negative? What is his/her usual perspective or bias?
   - Can I expect him/her to be knowledgeable? What has he or she written/produced on this or similar topics before?
2. What is the reporter's objective?
   - What has been indicated as the focus of this story?
   - Is there a particular issue he or she would like to cover?
   - Is this piece part of a larger series? What is the series about?
   - Who else is he or she interviewing for the piece?
   - Is he or she looking for "dirt"?
3. Who is the audience?
   - Local?
   - National?
   - Industry?
4. How much time/space will I have to get my point across?

- One quote?
- How many seconds?
- How many minutes?

5. What are my two or three key messages?

6. What are the three worst questions I may be asked?

   - How can I best respond to these questions?

B. Post-Interview Checklist

Immediately following the interview, take a couple of minutes to evaluate your message delivery. This will give you valuable information to take into your next interview. Ask yourself – and anyone else who was present – the following pertinent questions. (If the answer to any of these questions is a "no," consider how you might respond differently next time.)

1. Did you effectively communicate your key messages?
   - Did you make your key points succinctly?
   - Did you avoid using jargon?
   - Did you use anecdotes?

2. Did you appear credible?
   - Did you avoid responding emotionally?
   - Did you avoid giving personal opinion?
   - Did you support your case with facts and statistics, where appropriate?

3. Did you maintain control of the interview?
   - Did you avoid repeating negatively phrased questions, by turning answers to positives?
   - Did you return to your main points and objectives when asked off topic questions?

4. Did you appear at ease?

   - Did you use the interviewer's first name?
   - Did you maintain eye contact and smile, when appropriate?
   - Did you use effective body language?

5. Were you caught off guard?

   - Were you asked any important – or difficult – questions you could not answer or did not answer well?

6. And, finally, did you demonstrate enthusiasm and commitment to your cause?

Media Sheet #1 – Information Log

For Print Interviews

Media Outlet:

Reporter Doing Interview:

Background:

Phone Fax Email

Interview Date: Time

In Person? Location:

Address & Cross Street:

Room Number & Floor:

By Phone? Who will call whom?

Focus of Interview:

Has the Reporter been briefed?

By Whom?

Materials sent in Advance:

Expected Publication Date:

Photo to be taken? Photo required?

Media Sheet #2 – Information Log

For On-Air Interviews

Media Outlet:

Program:

Contact Person/Title:

Phone: Fax: Email:

Interview Location:

Address & Cross Street:

Room Number & Floor:

Procedures in Lobby:

Transportation Details:

Interview Details:

Taping Date: Arrival Time:

Taping Time: Length:

Reporter doing Interview:

Has the Producer/Reporter been briefed?

By Whom?

Materials sent in Advance:

Focus of Interview:

Names & Background of other guests:

Air Date and Time:

Media Sheet #3 – Follow Up Calls

Tracking Media Response

Media Outlet

Contact Person

Phone Fax Email

Contact Details

Date

Time

Action (called... sent release... sent media kit...)

6. Producing Effective Print Materials

The Write Stuff

Over the course of a campaign – and your career – you may be called upon to write a great many communications: ads, newsletter articles, and perhaps even your organization's fundraising appeals.

This chapter of the handbook provides you with a closer look at the key elements of the process, reviews some of the most frequently used vehicles, and offers a range of writing and layout tips designed to help you to maximize the impact of the print materials you and your organization produce.

Step One – Think It Through

Defining Your Objectives

As with every other activity your organization undertakes, it is worthwhile to think through your objectives before you start to write. If you're producing this material within the context of an overall strategic plan, you have likely already considered most of the items listed below, but ensure that these factors are top of mind in approaching the piece you will produce:

1. Who are you, as an organization? Everything about your writing – its character, style, tone and content – should be consistent with your organization's character, as well as how you want to be perceived. For this reason, it can be useful to develop a list of adjectives that take into account these two factors...and why. For example, are you and do you want to be perceived as:

    - Youthful/contemporary? Your organization provides programs for young people, or is staffed by young people.
    - Serious? Your organization deals with one of the infinite range of serious environmental issues, such as global warming, food safety, wildlife preservation …
    - Scientific? Your organization researches the impacts of climate change on coastal lands.
    - Flippant? Your organization was created to protest!

2. What are your objectives? Why are you producing *this* newsletter/brochure/ fundraising letter/ad? Limit your objectives. (One brochure, one newsletter article, one ad can rarely fill *all* of your potential objectives.) And ensure you are *specific*, for example:

- Not – To raise money for a project.
- But – To raise *$10,000* to fund our *Food Safety Program* by *August 15*.

- Not – To make people aware of our issue.
- But – To generate *1,000 letters* to the *Minister of the Environment* by *August 15*.

3. Who is your audience? You need to be clear on who is the target audience for *this* communication and write directly to them. Again, consider the following:

- What does this audience look like?
  - *Create a picture based on their basic (demographic) and lifestyle features. Are they professional women, age 35-45, with children at home? Are they professionals or working class? What is their first language? What language do they speak at home?*
- What is their distinguishing characteristic (psychographic, behavioural, other features)?
  - *What motivates them? What do they care about? What are their special interests?*
- In what capacity are you approaching them?
  - *As current or prospective donors? How much do they or could they give? What other organizations in your community, working on similar issues, do they donate to? How much do they give?*
  - *As current or prospective supporters? What do you want them to know, feel or do?*
  - *As key decision-makers?*

Step Two – Choose Your Vehicle

The Best Medium for Your Message

Certain media better serve certain goals, and your choice of vehicle will also have an impact on the way you write your material. A newsletter article, for example, rarely makes effective brochure text, and stories told in fundraising letters don't usually make good posters. If your goal doesn't lend itself to the medium, or vice versa, it's worth rethinking one of the two. Here's a look at a few of the most common vehicles, and their key characteristics.

A. Brochures

Brochures are typically overview – or "get to know you" – pieces written for people who likely aren't current supporters of your cause. This point is key because it means you are writing for people who are potentially completely unfamiliar with who you are and why your issue is important.

Brochures also typically include – or should include – a call to action. Don't be subtle. Invite them to make a donation (your copy must be emotionally engaging to prompt this sort of action), to get more information, to become a volunteer, or to become a member. (Include a tear-off form appropriate to your "ask.") Here are some tips:

- Create a mock up. Brochures must be written to fit specific page sizes – often very small (consider the standard three-fold accordion brochure) and generally, you have a limited word count to work with. Being concise is critical.

  Creating a mock up will make you keenly aware of the space constraints and help you to consider how to organize your content (length and substance) to create the best flow.

- Think about how it will be distributed. Your distribution plans can influence your approach (and the quantities you produce). Is this piece going to be available upon request or as a handout at events, indicating at least some level of pre-existing

Tips for Design and Layout

- Never use justified type. "Ragged right" type is easier to read than "justified" type which lines up evenly on both sides. Justified type also tires the eye – and bores the reader.
- Try to incorporate colour. Colour is not only visually appealing, it helps people retain information.
- Use photos, charts and other illustrations to tell the story and make brochures more interesting to the reader.
- Don't forget white space. A brochure jammed with content will look overwhelming.

interest? Or is it going to be a display piece, designed for anyone to pick up off a rack or counter?

- Ensure the cover is not an afterthought. The front cover of your brochure should entice people to read on! Consider how features like photos, headlines, and graphics would convey the impression you want to make.

- Use headlines, captions and other devices for emphasis. People often scan a brochure to get the gist before reading all the details. Use your headlines, captions and call-out boxes to tell the story, to emphasize key points and highlight key items like quotes, statistics and testimonials – as well as to add visual interest. (Once you've crafted your brochure, read these items alone to see what message they convey.)

- Consider its lifespan. If this brochure is meant to last for years, be careful about how you present time-sensitive information. For example, don't use "two years ago," use the specific date, such as "December 2000."

More Tips on Design

- Ensure your headline stands out. This one of your two key attention getters, so ensure readers can't miss it. Make it large and bold.
- Include a powerful photo or illustration. Even more people see the picture than read the headline, so make it one that tells your story.
- White space is key. In the midst of white space, a reader's eye is naturally drawn to the information.
- Avoid clutter. You need to help your reader's eyes to flow smoothly through the ad. (Readers start at the top left and follow a reverse s-curve to the bottom right.)
- Use sub-heads and captions. This helps break up copy and deliver key points.

B. Display (Print) Ads

Advertising is a selling tool no matter who is using it. Companies want people to buy their products and services. You want them to "buy" your position by taking the action your ad is going to suggest they take. As you develop your ad copy, here are some items to consider.

- The headline is critical. You're competing with every other headline on the page. It may also be the only part of your ad that gets read. Yours has to stand out *and* tell the most important part of your "story." Here are some approaches:

- *Appeal to your reader's self-interest. The "what's in it for me" may be either a positive something they'll gain or a negative they can avoid by acting. (And people actually often respond more to the fear of loss than to a gain.)*

  For example: Your Children Deserve a Place to Play. (A gain)
  Do You Want a Bleak Future? (A threat)

- Create Urgency. Give your reader a reason to attend to your message now.

  For example: If You Don't Act on August 15, Your Life May be Over.

- Ask a question. A well-crafted question often compels the reader to find out the answer. (Make sure your reader doesn't feel they can answer it themselves!)
  Not: Do You the Think the Government is Failing You?
  But: *Why* is the Government Failing You?

- You need to make the case. Remember, since this is an ad, people will tend to be sceptical. Facts make you credible and allow people to create a rationale to support their emotional reaction in favour of your position.

- Your ad may be long or short. If you want the reader to act, and you don't think they are getting information on the issue elsewhere, you need to provide them with enough information to come to judgement. (But *never* overwhelm people with the content. Use heads and sub-heads. Ensure you incorporate plenty of white space.)

- You absolutely must issue a clear call to action. Ensure you tell the reader exactly what action you want them to take: i.e., call a telephone number, write a letter. And you need to make it as easy as possible by helping to facilitate that action.

C. Fundraising Letters

Volumes have been written about how to write an effective direct mail appeal. There are formulas and rules (use the word "you" as liberally as possible, make the ask several times, use a pen to underline words to give the letter a personal feel…).

If you are responsible for writing your organization's pitches, consider keeping a file of the "good" and "bad" packages that you have received for both inspiration and reference. You may also want to invest in a good book on the topic, but even without knowledge of all the experts' rules, you can write winning fundraising letters by telling engaging stories about the people (or animals) who benefit from your work.

Think of the letters that draw you in: they use an emotional hook, draw a picture of an individual who you can relate to and show you in concrete terms how your money will be used. Here are a few fundamentals:

- Consider the *whole* package. You need to think about the outer envelope, the reply card, and the response envelope, as well as your letter. All of these elements should work together to make your package stand out and to encourage recipients to respond:
  - *The outer envelope. Your recipient takes only a second to decide whether to open your package or to toss it. That's why your cover envelope must peak their interest. You might use a "teaser," draw attention to a premium included in the package, use an attention getting format such as an unusual size; or, make your package look like a personal communication.*
  - *The reply card. This may be the first or the only piece of the package your recipient reads. Along with the administrative details, it should briefly repeat the crux of your appeal. State what will be achieved through your donation, and specify suggested gift amounts.*
  - *Reply envelope. This is self-explanatory; make it easy for your donor to respond!*
- Take as much space as you need! While donor letters are typically a little shorter, letters to new prospects can be as long as four pages in length. People often scan fundraising letters looking for information that interests them, so a long fundraising letter helps you ensure that you've included a number of arguments to appeal to different readers.
- Be Personal. Write as if you are writing a personal letter to a friend. Yes, "you" should be used frequently. An individual should generally sign the letter as well. And if you have a "relationship" with this person (they have supported you in the past), be sure to highlight that in your letter.
- Humanize your appeal. People give to help people, and to situations with human impacts. Here are some approaches:

- Tell Stories. *Fundraising appeals are a key opportunity for telling your stories. They are your most valuable assets when you write a fundraising letter; incorporate them whenever you can.*
- Focus on your reader. *Give them all the credit for the outcomes you achieve. Start with a potent presentation of the problem. Then, show how your organization will be able to solve the problem, with the donor's vital financial help.*
- Focus on the benefits and results, not your needs. *Unless this is an authentic emergency appeal, your letter should focus on the outcomes you'll achieve.*

- Ask for the *money*...several times. Your letter should make your request for financial help very clear. Repeat your request several times in the body of the letter as well as on the reply device.
- Create urgency: a reason to send money NOW. Try to create a compelling reason for why you need their money right now. Do you have a campaign deadline (the upcoming election, the upcoming passage of a piece of legislation, an upcoming legal challenge, or a deadline for a matching grant)? Instead of giving a date, use a phrase like "within the next two weeks."

D. Newsletters

Newsletters typically contain a range of articles designed to expand the reader's awareness and knowledge of your issues and programs. *Most* articles fit into one of categories listed below. In order to shape and focus your ideas, start by identifying which type will best suit your goals and subject:

- Commentaries/op-eds – express the writer's opinion or explore a topic in a distinctly personal way. Use commentary to stimulate your readers to think, change their opinion, or get involved!
- General interest pieces – provide basic information on a given subject. (If your ideas are focused but can't be named, call it a general interest piece.)
- Lists/top tens – often written in point form, this style is great as a sidebar to a longer article. For instance, if your article is on how industry impacts global warming, your sidebar could list the top ten polluters, or "ten things you can do to help reduce global warming."

- How-to – show the reader how to perform an activity.
- Nostalgia – focuses on people, places and events at a particular time in history, generally with a warm, positive tone. This type of writing can be very effective if your goal is to engage your readers in a way that makes them want to donate money to your cause.
- Personal experience: written in the first person – this style is effective when you want to gently move a reader from one belief or activity toward another. For example, a personal story about a woman who decided to leave her car at home and commute to work by bike could inspire others to do the same.
- Profiles: a personal or professional portrait (sometimes both) of a particular individual (or animal!) – instead of a memorial, how about writing profiles of your volunteers and partners? They'll show the article to friends and colleagues and you will likely benefit from more community interest in your organization.
- Service – often aimed at the reader as a "consumer," giving him/her information to make a choice or selection. The next time you have a new service to publicize, consider the story-telling approach to let folks know that you have a resource available to help them make better choices, find help.
- Survey: a round up of comment, advice, quotes, etc. on a particular subject from notable sources or experts, such as you and your organization – the content can be opinions, remembrances, hard information, and tips: just about anything on one theme. A survey allows you to approach a complex subject from many angles.

E. Posters & Flyers

The same rules that apply to creating effective ads apply to creating a successful poster. If this poster is part of a suite of materials, your copy can and perhaps should be similar to the brochure or to the ad.

Poster copy should be written with the design in mind, and a sense of where the poster will be displayed. If it will be hung where people spend time (at a bus stop), you can include much more copy than if located where people won't see it for long (on the side of the bus).

The Process -- From Angle to Kicker

Now that you have made a few key decisions, this section will take you step-by-step through the writing process – from choosing your angle to writing your kicker. But, before we get started here are just few preliminary considerations.

- Keep Your Final Product in Mind. Are you writing for a newsletter? Are you writing for a brochure? How many words do you have to work with? How many panels do you have to fill? Are you writing an ad copy? Is it for a newspaper? Is it for a bus shelter? Will there be images with the text? Are you writing a poster copy? Where will the poster be posted? Can you use colour?

- Always assume people are not going read the whole thing, whatever it is! Never bury your message. Place your key points in the places most often read – in headlines, subheads, call-out boxes and captions.

- Always focus on *one* reader. Your ad, your article, your brochure, your letter; they are always read by one person at a time so your writing should be geared to that one reader. Your communication should always be directly relevant to their interests and concerns. And wherever it's appropriate, make ample use of "you" as opposed to "they."

- Try to paint pictures. Whenever you can, invite your reader to experience the world you are writing about. Visceral images have emotional impact and are always better retained than clinical facts. Whenever emotion and logic come into conflict, emotion always wins! People make emotional decisions and then create the logic to justify those decisions!

- Use active verbs. Stay away from passive sentence constructions. Putting a person front and centre is more engaging and verbs that express action make your copy move.

A. Identify Your Angle

No matter what medium you have chosen, you will need to choose *one* aspect of your issue and *one* angle from the wide variety of possible approaches to your "story." You should be able to state your angle in one line – clear and explicit.

Here are a few approaches to developing your angle:

1. What is the take away? Again, it's always good to start by considering the outcomes you want to achieve. So, consider developing one-line answers to each of the following:

   - What do you want people to *feel*? Knowing what you want people to feel can be an effective way to identify the information you want to present. If you want them to feel empowered, you'll want to give them actions they can take. If you want them to feel angry, you'll want to make a case for that anger. Use adjectives.
     - *For example: happy, angry, sad, guilty, inspired, intrigued, empowered, etc.*
   - What do you want people to *do*? What you want people to do can also help dictate your content.
     - *For example: write a letter, donate money, become a volunteer, get involved, etc.*
   - What do you want people to *know* as a result of this communication? What information do people need in order to feel the way you want them to or compel them to take the action you wish them to take?
     - *For example: What information will make them feel angry that the mercury in our fish is endangering children's health? What information will convince them to write a letter opposing Bill C-10? What information will make them feel empowered to reduce their pesticide use?*

2. Microscope your topic. Another effective approach is to start with your global issue and keep adding (brief) descriptors that progressively narrow down your focus. For example:

   Topic: Watersheds
   - Still a topic: Our *endangered* watersheds
   - Still a topic: Our *endangered coastal* watersheds

- Still a topic: The *state of* our *endangered coastal* watersheds
- Angle: Ten steps coastal residents can take to protect their watersheds.

3. What are the *fundamental questions* you want to raise as a result of your communication? Test your angle with the "why?" and "what does it mean?" tests. For articles that are written to share information, this can be a particularly effective way to further "microscope" your angle. For example:

   Topic: Toxic Dumps

   - Angle: Is the air safe to breathe 100 km downwind of a toxic dump?
   - Why? Why do we allow so much toxic dumping in areas where people live?
   - What does it mean? What does it mean to the health of our children?

B. Write Your Lead... That Critical First Paragraph!

Your lead sets the tone, and the reader's expectations, for what will follow. (A boring lead tells the reader that more to bore follows. Use a funny lead and the reader will expect humorous content; a word play in the lead and the reader will expect to see more plays on words and other literary devices in the article.) Whatever you choose, your opening lines must be provocative enough to get your reader's attention.

Your lead should also provide enough information to get the story going and it should answer the reader's all-important "what's in it for me?" Remember, your reader expects to be entertained, to learn

Types of Leads

Here are a few styles you can apply to your lead. Don't let this list restrict you, but if you're having trouble getting started, brainstorming leads within these different categories may loosen you up and help you find just the words you're looking for.

- Anecdote – a story in a couple of sentences.
- Clusterings – a rapid succession of single words, short phrases.
- Composite – a brief description of a real or fictional person.
- Contrast/Comparison – life is x, imagine life as y.
- Declarative Statement – a fact
- Descriptive – a visual picture, lots of nouns.
- Direct Address – "Needed: your help to..."

⇨

something new or to have their emotions engaged. And whatever you choose as your lead, you will need to be able to "back it up" with the rest of your story. Write down some powerful verbs and nouns that may be useful. Describe the main character of your article. Then, just write! You'll edit later.

- Humour/Irony – making light of the situation.
- Metaphor/Figure of Speech/Play on Words – "The silver lining…"
- Narrative – someone did something; someone else did something; others did things…
- Paraphrased thought – "If I'll…."
- Parody – once upon a time…
- Question – if this x happens to you, would you know what to do?
- Quotation – words from the protagonist
- Sensory – draws sound-scapes, or smell-scapes.
- Shock/Emotional Impact – uses "tragic" words.
- Single Word – "Shame!"
- Speculative/Hypothetical – what if…and suppose…how would you feel….
- Stage Setting – capturing a moment, an hour in a few sentences.
- Summary/Statistics – "According to…"
- Surprise – provides info that leads reader in one direction, then spins them around.
- Tabulation – a factoid followed by a supporting list.
- Teaser – hints at the topic, builds suspense.

C. Develop the Connecting Ideas, Facts, Stories, Images, Etc…

With your lead, you've set up your promise. Now it's time to back it up with the rest of your "story."

Depending on the medium you have chosen, the body of your piece may include one or more quotes and examples to illustrate your case. You may need to write an additional 200 words to complete an article. Or if you have chosen an ad, you may simply need a quote and nothing else. Then, put those pieces into the appropriate structure for the medium of communication you have chosen. If you chose a print ad, draw a mock presentation of the ad with images. If you chose a brochure, determine what information will be placed on what panels.

Use anecdotes, analogies and comparisons

The key to each of these forms, described below is: "show, don't tell! In general, the act of *telling* requires the use of adjectives and adverbs, whereas the act of *showing* makes you rely on verbs and nouns to build the picture. Here's an example:

Telling: The grizzly bear population has dropped 25% in the last ten years.

Showing: In 1990, the feeding grounds looked like a two-acre bear skin rug. Today, in these same fields, a sea of flowers with small spots of fur greets the eye.

- Anecdotes – Anecdotes are tiny tales that capture the human drama and illustrate the meaning of your larger story. Anecdotes can be touching, funny, shocking, heartwarming…anything as long as they are revealing.
- Analogies – An analogy likens one thing to another to help the reader understand your point. For instance, an analogy to explain the human heart is that it's like a pump.
- Comparisons – Similar to an analogy, a comparison pulls two distinct ideas together to make a point. Comparisons commonly draw from popular culture or fairy tale images: Sarah skipped down the street, feeling like Dorothy on her way to Oz.

Draw Out Effective Quotes

Good quotes are a great tool for breaking up and enlivening long stretches of text. They also allow you to say things that you can't say in the "unbiased" text. Here are the qualities of a good quote.

- It has meaning and is pertinent to the subject. Don't just stick in the quote because it is colourful or outrageous.
- It reveals character, emotion or information. The best quotes are generally those from which the reader learns something important about the subject, event, character's personality, etc.
- It serves a purpose, reinforces a previous statement, changes the tone of the piece or presents new information. Don't repeat information that has already been provided.
- It says something better than you can say it in your own words. Conversely, if you can paraphrase the information more effectively than the "source" said it, do so.
- It is lively. Never use a dull quote! If the information is valuable, but the quote is dull, paraphrase it.
- It sounds real. A quote, whether provided by the "source" or written by you, should never sound concocted.
- It does not run on endlessly. If the quote is "too long," break it up with your words and keep just the lively parts of the quote.
- It is placed judiciously. Quotes may be used as leads or kickers, or within the body of the text. In general, they are most effective when sprinkled throughout the copy to add spice and variety.

D. Coming to a Close (The Kicker)

The last lines or words of your article are as important as your lead. A lead entices your reader and gets the story going. Your kicker finishes it. It's your last chance to make an impact on your reader and to drive your point home.

Just as there are no rules for the form of a lead, there are no magic formulas for effective kickers. Typically, they "circle back" to the theme you established in your opening. At the very least, they wind up at a point that "feels right," and leave the reader with a distinct feeling, impression, message, or important piece of information. They can be as simple as a quote – one of the most common types of kicker – or as creative as an elaborate word play.

> To find your kicker
>
> - **Read through your piece in whole.** Note your lead, a key quote, your analogy or anecdote. If your angle is fully captured within one of these tools, refer your kicker back to that point.
> - **Experiment.** Write a kicker that could act as the lead to a follow-up article on a related topic. Again, the trick is to not edit yourself, but let your ideas flow, and to capture them.

Step Four – Select Your Images & Illustrations

The Pictures that Convey Your Story

Photos and illustrations, effectively chosen, will convey your messages even if the reader opts not to read your story. Here are some tips to selecting photos and other illustrations.

1. **Photos: the value of visual representation.** A photograph, particularly of a person, conveys meaning and will add depth to any piece of writing. It can say what you may not have been able to. Here are three very simple rules to follow when taking or selecting photographs:

   - **Include people** – but try not to include more than five or your image is likely to lose its focus and the faces lose their expressions.
   - **Have the people doing something** – action is much more interesting than a blank stare, unless the stare is the action!

- Make the background say something – unless you are trying to show how clean a person is, don't use a white wall as your background. The photograph's environment can say as much as the people in the shot.

2. Charts and graphs: providing the facts. As noted throughout, a compelling chart or graph increases the audience's perception of the validity of your information.

   - Choose a gripping statistic – A startling statistic can deliver the whole story. (But ensure that the information *is* persuasive and accurate!)

Step Five – The Rewrite

The Vital Final Step

Let your piece sit for a day or two before you consider it finished. Then go back to it and make adjustments to the copy. Strengthen the weak verbs, tighten up loose language, and cut out the flab.

- Look at your lead with a fresh perspective. Does it accomplish its goal? Could you pull an anecdote from the story to kick your article off to a better start? Have you done your best to "show" and not "tell"?

- Test the strength of your communication. With a red pen, circle all of the negatives:

  - *Adverbs and adjectives*
  - *Clichés*
  - *Generalizations*
  - *Jargon*
  - *Modifiers*
  - *Needless repetition*
  - *Padding*

Then, underline each positive:

- *Anecdote*
- *Concrete fact*
- *Example*
- *Image*
- *Revealing quote*
- *Statistic*

You should have plenty of the latter and relatively few of the former!

Worksheet 5: Producing Effective Print Materials

This worksheet walks you through the writing process – from determining your objectives and selecting your medium to writing your kicker.

Step One – Think It Through

1. Who are we?

List four descriptive words/phrases that describe your organization's character and its approach:

For example:

Our character is: youthful, playful, serious.

Our approach is: educational, scientific, action-oriented…

1. ______________________

2. ______________________

3. ______________________

4. ______________________

2. What is the goal of this piece of writing?

Be as specific as possible. If you can't quantitatively measure your success, your goal needs to be more concrete. Use numbers and dates, verbs and nouns.

With this piece of writing I hope to ______________________________

Verb

______________________ ___________________________

Noun(s) Timeframe

3. Who are your audiences?

Be as specific as you can, naming one person who represents each audience if possible:

E.g. High school students people like my nephew, Bill

- ____________________________ people like ________________________
- ____________________________ people like ________________________
- ____________________________ people like ________________________
- ____________________________ people like ________________________

Step Two – Choose Your Vehicle

4. What's your medium? How will your writing be presented?

- Are you writing for a brochure? How many words do you have to work with? How many panels do you have to fill?
- Are you writing for a newsletter? What kind of article will it be?
- Are you writing an ad copy? Is it for a newspaper? Is it for a bus shelter? Will there be images with the text?
- Are you writing a poster copy? Where will the poster be posted? Can you use colour?

Step Three – You're Ready to Write

A. Identify Your Angle:

5. What is the take away? Develop a one-line answer to each of the following:

- What do you want people to *feel*?

For example: happy, angry, sad, guilty, inspired, intrigued, empowered, etc.

- What do you want people to *do*?

For example: write a letter, donate money, become a volunteer, get involved, etc.

- What do you want people to *know* as a result of this communication?

For example: What information will make them feel angry that the mercury in our fish is endangering our children's health. What information will convince them write a letter opposing Bill C-10? What information will make them feel empowered to reduce their pesticide use?

6. Focus the microscope until you can explain what your piece of writing is about in one sentence.

Topic 1: ________________________________

Still a topic: ____________________________

Still a topic: ____________________________

Still a topic: ____________________________

Angle 1: ________________________________

Topic 2: ________________________________

Still a topic: ____________________________

Still a topic: ____________________________

Still a topic: ____________________________

Angle 2: ______________________________

7. Test your angle with the "why?" and "what does it mean?" tests. For articles that are written to share information, this can be a particularly effective way to further "microscope" your angle.

Topic: ____

Angle: ____

Why? ____

What does it mean? __________________________________

____

B. Write Your Lead...that critical first paragraph!

8. Play with lots of ideas from the list – provided in the box, starting on page 135.

- Develop the connecting ideas, facts, stories, images, etc...
- Use anecdotes, analogies and comparisons

9. How can you "show" rather than "tell" your story?

- Is there an effective anecdote; that is, a touching, funny, or shocking illustration that involves people and captures the essence of your larger story?
- Can an analogy be drawn between the issue you wish to illustrate and another situation that is common to the reader's experience?
- Can you make a comparison? Are there two distinct ideas that can be pulled together to make your point?

C. Finding an Effective Quote

10. First identify who will provide the most compelling quote(s). You may decide to provide quotes from several sources. List the names/experience/expertise of each of these people.

-
-
-
-

11. Based on your angle, identify the points that each individual you have identified is able to make:

- What points do you wish to make that could be more powerfully expressed through a quote?

D. Coming to a Close (The Kicker)

12. Read through your piece in whole.

- Where is your angle most fully captured?
    - *Is it in your lead, a key quote, your analogy or anecdote? Refer your kicker back to that point.*

13. Experiment. Write a kicker that could act as the lead to a follow-up article on a related topic. Again, the trick is to not edit yourself, but let your ideas flow – and capture them.

7. Media, Communications And Web Strategies

Building Wired NGOs

By this point, it's beyond clichéd to comment on how dramatically the Internet has transformed media and public relations work over the last decade. Much ink has also been spilled about the commercialization of public space on the Internet. One important topic that has received little exploration, however, is the massive impact the wired revolution has had on NGOs and civil society.

For most not-for-profits, the notion of community is central – and the web has facilitated a level of off-line or real world network building and organization that was unimaginable just a decade ago. Although it is difficult to assess exactly how much the web has transformed the work of organizations, doubtless it has impacted how campaigns are planned; it has allowed for more efficient communications with reporters and for more effective work with chapters and volunteers. Not to mention the web's growing capacity to help organizations deliver new services, reach more beneficiaries and allies, and to attract more supporters at less cost than conventional methods of communications outreach.

♈♈♈

In this section of the handbook, you will find some basic information about how to use the Internet and your website more effectively – that is, to further your NGO's mission. (Note, this handbook also contains a list of links and resources that will connect you with more advanced information as you develop your skills –see Resources – page 167.)

For anyone who has been swept up in the excitement of creating a new site, it is understandable that sometimes the lure of a dynamic new Internet-driven campaign can make it difficult to remember why an organization may have started the work in the first place. The most important advice: be very clear on your goals as you embark on your

Internet communication efforts. As with all communications efforts, success is largely the result of good planning and efficient use of available resources.

Our Current State

How Canadians – and Canadian NGOs – are Using the Web

Before delving into the details, let's look at our current state.

A. How Wired are Most Canadians?

Canada is one of the most wired nations in the world. The Canadian Consumer Technology Study 2000[1] found that 48.2% of Canadians are online, compared to 43% in the US, 38% in Australia, and just 26% in Europe. Canadians also lead in the average hours of Internet use per week with 5.1 hours/week, up from 3.9 hours/week in 1999. A recent study released by Statistics Canada indicates that some 41% of Canadian households use the Internet regularly, with 67% of them online between 10 and 20 hours per month – and that's just usage from home. Undoubtedly there still exists a digital divide – a gap between those with resources and those without that determine who has access to the Internet.

B. How Do Canadian NGOs Rate?

Canada's voluntary sector has emerged as a world leader in the area of Internet usage. According to a 2001 Government of Canada report[2], we lead in both connectedness and in public programs targeted at voluntary sector IT issues.

The same report tells us that most not-for-profits in Canada have access to email and websites. The most important finding, however, is that, despite our high levels of connectivity, few organizations are using technology strategically. Innovative uses of technology to solve not-for-profit business problems are not widespread within the sector. Only small numbers of organizations are using technology to:

- Share information with stakeholders
- Improve management systems
- Deliver services to customers
- Build online communities or networks
- Access satellite offices or remote locations
- Strengthen internal governance

In October 2002, Canadian not-for-profit Internet strategists, The Commons Group (commonsgroup.com) and Communicopia.net completed a survey of Internet usage patterns among Canadian and US not-for-profits working on the environment, social services and other issues that maps well against trends identified in similar surveys.[3] It also suggests that while the basic infrastructure is in place, organizations have yet to take full advantage of the strategic power of the Internet.[4]

Of the 38 organizations they surveyed, almost all were online and had mastered the basics of using the Internet. However, the survey found that many organizations were still struggling with more strategic technology issues such as campaigning, and collaborating online.[4]

Interesting statistics from the survey include[4]:

- Most respondent organizations already had a basic web site (94%), but only a third said that their web sites were interactive enough to engage their community (33%).

- Respondent organizations are relying increasingly on internal technical staff, with an average of 53% of all technical work being done in house.

- Less than quarter of organizations had a strategic plan for their web site or online campaigns – a major foundation for the more effective use of existing tools.

- Few organizations believed that they have adequate ability to collaborate online (14%) or manage their documents and information (17%).

- Over 65% of respondents said they have the skills and software they need but are not yet able to apply them powerfully and effectively.

- In response to this gap, most organizations planned to add interactive systems like web content management (83%) and donor relationship management software (61%) in place within a year.

Getting Started

Developing a Web Strategy

The web is one more powerful tool to help you communicate with your target audiences. But if your strategic target audience is not on the Net, the web might not be the best place to invest your limited communications resources. As mentioned in the introduction to this chapter, the web is simply one of many tools that you can use to ramp up your organization's communications. However, it must be integrated into your communications strategy. Give it the same consideration you would other tools like media relations or advertising.

You don't have to be an expert on the technology to think creatively about how to integrate the web into your community organizing, research, policy advocacy, media outreach and fundraising efforts. When it comes to reaching the public, web tactics work best when they are part of a comprehensive, integrated plan, so don't forget old-fashioned print, radio and TV. Use all media available to communicate your message and give a distinct impression of your organization

This integrated approach helps us attain one goal: growing the capacity of our organizations to engage the media and build stronger movements. Keep these goals in mind with every click of your mouse, and you'll guarantee that your efforts extend beyond online, tech-savvy audience to the broadest community possible.

Here are some strategic media planning tips:

1. Know your communications goals. Again, you will not reach your goals unless you are very clear about what you want to achieve and by when. Based on your-big picture goals, define your more immediate objectives. Then, force yourself to use numbers, dates and other benchmarks so that you can measure your progress. It may be 500 new users by fiscal year end or 35 media hits in a quarter – clarity of purpose is central.

2. Ensure your planning connects with current communications and available resources. Fifty percent of web project development is planning – this includes scoping, a content strategy, developing your information structure or architecture, testing prototypes as well as your strategy for the life span of the site. When planning think carefully about the kind of budget you have. Ask yourself, for example:

- *How long is this website going to be up? Two to three years? Six months?*
- *How often do you expect to re-design or update your printed materials?*

Some Common Internet Strategy Pitfalls

In her work as an Internet Consultant with Toronto-based Meta Strategies[5], Fiona McCool has worked with a wide range of community organizations large and small struggling to take advantage of the possibilities that the Internet can offer. Here are some of the most common strategic pitfalls she has come across along the way:

- Getting wrapped up in bells and whistles. *"This flash splash page is great but where can I find out what time the next task force meeting is?"*
- Biting off more than you can chew and running out of steam. *"Now that our site is live, we should talk about who is going to moderate the dozen online discussions, write the daily press releases, send the weekly email bulletins, update the resource and volunteer contact databases and maintain the Fax your MP server".*
- Neglecting to integrate your on and offline efforts. *"Now that our campaign is over, we ought to mention it on that website of ours…what's the URL again?"*
- Thinking that if you build it they will come. *"I registered our site on all the search engines so how come no one is participating in our online discussion area to comment on the latest Provincial clean water legislation?"*
- Neglecting to respect your audience's limited time. *"Please click here to download our 45 page single spaced Word Document on this hot issue!"*
- Trying to do it all. *"Click here to sign up to receive our daily digest of ALL the NEWS on environmental issues happening everywhere on the planet".*

- *How does this plan dovetail with your overall communications strategy and goals?*

3. Research your opportunities and threats. Visit your opponents' websites to see what they're up to. If they've posted a new press release or have announced new information, you should respond to that information in the same news cycle. As important, keep up with breaking news on your issue and in your community by visiting the websites maintained by your allies, coalition partners and others who are relevant to your work. Find out if these folks have listservs so that you can subscribe and have their news sent directly to you. Finally keep abreast of what's happening. Complete research and gather information for projects you'll be working on throughout the day. Be sure to check on archived press coverage to see how the media has covered the subject in the past.

4. Identify and research your target audience. Understanding your target audiences is as key to your web planning as it is to your overall communications planning. Are your target audiences seniors? Youth? Decision-makers? Reporters? Executive directors of partner organizations?

   Part of this task is to do some research about where these groups get their information online. Which sites do they love? Hate? And why are they using the web? Is it to download reports or to research the policies of funders? One of the key strategic decisions you must make in using the web to communicate with your audience is how to get your information in front of the right people. Should you push your information at them via listservs and email, or is it better to pull your audience to your web site, where they can get the information they want when they want it? If you are lacking this type of information, then consider undertaking your own market research. It can be remarkably helpful to assemble small groups of target users and ask some questions about how they use the web, or to conduct a number of phone interviews. We have included an example of a web usability questionnaire that you can use and tailor for your purposes at the end of the chapter.

5. Ensure you apply message discipline. Your online communications efforts should ALWAYS reinforce your message. All of your communications with the media and

other target audiences, online or off, must be strategic and goal-driven. If your materials aren't mission-driven, if they aren't moving your organization's message, you are wasting valuable resources and squandering your best opportunity to tell your story.

6. Implementation should be integrated. As noted earlier, it is important not to forget other types of media when working with the sexy web. Ensure your web strategy takes a full range of communications possibilities and tools into account.

The Media in Focus

Reaching Reporters Online

Whether you are a technophobe or a technophile, the Internet can be a vital part of your media work, providing you with a new set of inexpensive, fast, easy-to-use tools to help accomplish your communications goals. Take for instance, your enhanced ability to work with media.

Email has increased the capacity of not-for profit organizations to tailor releases to the specific interests of a particular reporter or editor – by, for example, cutting and pasting to include local or regional angles, economic information, or environmental impacts – whatever pertinent information will customize your story for your target reporter. And the advent of great online media presence has meant that one of the most expensive, labor -- intensive elements of communications work – the research and maintenance of up-to-date media lists – has been made significantly easier. Simply hit the sites of your target outlets. This helps you find contact information for key reporters and gives you a great opportunity to become familiar with past coverage of your issue through easy access to archived articles.

For the reporter, gathering information is as important to good reporting as writing is. And – through interviews, telephone calls, libraries and government files – the skilful reporter knows how, for example, to find the population of Cobourg or how to contact the best expert on global warming. Today, journalists are also finding this information on the Internet. Journalists use the Internet to monitor their beats, find experts and research any number of topics.

We know from recent research conducted with reporters that most reporters begin their story with a trip to the Internet. In the fall of 2001, public relations firm Benchmark Porter Novelli conducted a national survey of Canadian media and how they use the Internet.[6] They spoke to more than 100 Canadian writers, editors, beat reporters, producers, and freelancers. The majority of respondents reported that they spend more than three hours each day online, and the top three reasons to go online were:

- Research
- Identifying Contacts
- Receiving and Sending Emails

The study highlighted that many websites fail to meet the most basic needs of journalists. As evidence, reporters cited a lack of clear details and simple language explaining the most basic information about what an organization does or whom the media should contact for information. It is worth emphasizing that if a reporter is on deadline and they rush to your site but cannot easily find the appropriate contact person and number, chances are they will go somewhere else. In fact, in a recent US study of reporter's web usage, most said that poorly designed websites could single-handedly discourage their coverage of a company (Nielsen Norman Group 2002).[7] One of the most important things you can do is to ensure that your website is media friendly.

Tips for Creating a Media Friendly Organizational Website

- Register your site or if you build it they may not find it. As mentioned elsewhere in this chapter, reporters often begin their research with a trip to the web, especially to search engines like Google. So, register your site with popular search engines. It's also worth registering misspellings and obvious variations on your organization's name.

- Avoid flash and shockwave on your home pages. Many reporters have slow dial-up connections, meaning your fancy bells and whistles can cause their computers to crash.

- Writing for the web. Apply these attributes to *all* of your writing for the web:
  - Simple
  - Active voice
  - Slightly less formal – as if you were speaking
  - Short sentences
  - Up-to-date: remember that your web presence demands ongoing upkeep and effort to keep it relevant, interesting and fresh
  - Create concise abstracts with links for download

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Netiquette with Reporters

Sending News Releases and Contacting the Press Online

Here is some key advice on how to approach the media via email.

1. Efficient Distribution or Spam? – Ask first! By printing e-mail addresses alongside their by-lines, many journalists are encouraging their readers to use the Internet to take part in the news. A lot of online news sources host chats with journalists, post reader comments alongside stories and encourage online discussions. Many reporters are also requesting that your organizational dispatches be sent via email rather than via fax. And, many organizations are creating email distribution lists for sending out news releases, rather than the more familiar fax lists.

   If reporters feel that you are abusing web communications and sending tons of needless junk email, or spam, chances are that they'll delete your information and they'll be far less likely to cover your news. When you speak to a reporter, ask her or him how she/he prefers to receive information. Never add some one to your email list without their permission. If in doubt: fax.

▶ Create a media room or news bureau on your site. Create a dedicated online space to house all your media materials. Post recent coverage, your organizational press kit, images for download by newspapers, media releases and advisories, fact sheets, and research where relevant.

List the most recent release first and make sure the date is prominent and provide a category for each release. Also consider links to third party resources like a search engine or online news outlet to assist reporters in their research.

Through your website you can provide:

- Breaking news
- Background information on your organization
- Background information, briefings and context for complicated issues
- Data, charts and graphics such as photos and illustrations
- Subscriptions to a listserv that sends out weekly e-mail alerts to reporters and interested readers
- Detailed contact information

⇨

2. Don't be a Stalker. Email follow-up is so easy. And yet can be so annoying to reporters. Don't bombard editors with e-mails asking why your piece was not accepted – you'll only

irritate them and harm your chances of being picked up later. Call them once to follow up and ensure they've received your missive if it is hard or breaking news.

3. Exclusivity. Don't send reporters releases indiscriminately. Reporters don't like to feel like they are part of a herd, even if they are. There are a few things you can do to sidestep at least the perception that you have sent your release to everyone and their dog. Don't send a press release to your entire press list with the whole list visible – reporters will feel like cattle, all being herded to cover the same story. Try to customize your releases to match the interests of individual reporters to increase your chances of coverage. If you must send to a large list, use the "bcc:" field to prevent the entire list of names from appearing in your email. And send your release to targeted and appropriate places only. Keep your news relevant to targeted editors and never add someone to your email list without her or his permission.

4. Don't send attachments. Most Canadian newsrooms are not outfitted with the most up-to-date technology. Attachments have been known to shut down a reporter's computer, which can make reporters very, very angry. Avoid this at all costs, and email them info in the body of an email.

- Site layout. To avoid bombarding reporters (and other users) with too much information all at once, consider tiering your information so that only short descriptions or titles of documents are visible on the front page. Link these titles to the page that displays the detailed information. You may want to preface large documents with a quick outline offering links directly to different sections. That way, reporters can go directly to the information they're looking for, rather than digging for it.

- Contacts, Contacts, Contacts. With 83% of Canadian media going online to identify their news sources/contacts, make sure your website provides all contact information for media, including contact name, telephone, e-mail, company address. Put contact information on every page of your site. In your press area, place the public relations contact information on every page, press release and speech.[8]

5. Make the subject line compelling and/or provocative. An attention-grabbing subject/headline is crucial. You must entice a reporter to read the juicy content of your email instead of simply hitting the delete button. Don't say "Press Release" say "XYZ organization demands reform from City Hall." Or "Ground-breaking new report reveals XYZ."

6. Keep it short. Who wants to scroll through screens and screens of text? Try to limit your email release to about 250 words. You can direct reporters to your website for more detailed information.

7. Keep your site up-to-date. Don't let your site get out of date. Nothing destroys your credibility faster than a website that is the cyberspace equivalent of a ghost town. Add breaking news, press releases or new information relevant for public consumption regularly. If you aren't the webmaster at your organization, work closely with them to keep the site up-to-date and be sure to keep them informed of the news you are making.

8. Make sure your contacts listed in emails and online are readily available. Make sure there is someone who is available and can answer questions on demand at the address and phone number you've cited on your site. Always identify yourself and provide contact information – it enhances your credibility. Be sure to include your contact e-mail address and website URL in a prominent place, and make sure that you have a useful signature file (the piece of text that appears at the end of every e-mail message). It should be brief, but contain your name, company, one line about what you offer, telephone, fax, e-mail and website address. Again, put this at the end of the release; don't make a reporter scroll through your contact information to get to your news.

Other Online Tools of Engagement

"Most people haven't realized that websites are not places for selling things – they are places for giving things away, for creating a relationship based on an exchange of ideas. Data: that is the currency." – Haig Armen, one of the founders of CBC Radio 3 and an award-winning website designer

One of many lessons the Internet has demonstrated *writ large*, is that ideas, messages and behaviours spread just like viruses do. Yet in order to start an idea epidemic, you've got to direct your brilliant ideas for change towards the right "carriers." One of the mistakes that not-for-profits make is communicating messages to supporters and not to opinion leaders in our communities. In his fascinating look at how ideas spread, *The Tipping Point*, Malcolm Gladwell refers to the people who don't make this mistake, and who do understand the importance of also communicating with opinion leaders, as “connectors”.[9] What makes someone a connector? The first and most obvious criterion is that connectors know lots of people. They are the kinds of people who know everyone. We all have people like this in our circles of associates and colleagues, but we don’t spend a lot of time thinking about their importance to the effectiveness of our grassroots campaigns.

Lots of research supports the fact that the Internet and perhaps your website is where opinion leaders will find the data and ideas they are hungering for. A recent groundbreaking study conducted by Burston Marsteller and Roper Starch Worldwide,[10] on the relationship between opinion leaders and the Internet, identified a group of "online movers and shakers," calling them "e-fluentials." Demographically quite similar to the general online population, e-fluentials "value dialogue and information exchange (and) overwhelmingly believe that the Internet is the best place for it." They are very active Internet users: three quarters of them go online at least once a day, and more than half spend at least two hours online. While online, they make extensive use of email, newsgroups, bulletin boards and other Internet communication tools.

This group tends to crave knowledge, and visits all types of websites. (They prefer interactive sites that allow users to shape some of the content, and they are more likely than most to offer feedback about a website.) Possibly because of this information-hunger, associates perceive this group as authorities on consumer and business issues and current events. Three times more apt to be asked for advice online than the "regular" Internet user, most e-fluentials believe their opinions make a difference (and half of them say they enjoy changing people's minds). They are also "early adopters" who are twice as likely as other netizens to be asked for their opinions on technology. Though these are American statistics, Canadian PR practitioners -- particularly in Alberta, BC and Ontario- should pay close attention.

This audience segment, opinion leaders within the general population, are out there and waiting for compelling or “sticky” ideas. You need to create a relationship with them. Mobilize them to get the word out about your cause. At its most cynical, this is referred to as permission marketing. At its most idealistic, creating an online community.

Whatever your goals are for creating an ongoing relationship with your target audiences, you must have "real world" channels, actions, and inputs to make online activist tools attractive and meaningful and inviting for return visits.

Tips for Mobilizing Opinion Leaders

Email newsletters and listservs

An email newsletter or mailing list can be an effective way to "push" your information to your target audience. Think of how much time and money your organization spends on the monthly newsletter – would switching to email be an effective way to reach your target audience without the cost or hassle? With email newsletters and mailing lists you can:

- Reach a broad number subscribers directly
- Reach subscribers while they're sitting right at their computers ready to click over to your web site
- Reach subscribers cost-effectively

Some More E-Tips:

- Don't overburden your audience with too much information. Keep your email newsletter short – remember that if you want to provide more information, you can also direct folks back to your web site. Offer your information in short chunks – just a few sentences in each paragraph.
- Keep it concise and tight. Prompt them just enough to be useful but not so much that the email becomes a burden, Provide separate email addresses for subscription and un-subscription and include information on how to get off in every mailing list message
- Make resources available and accessible – share what you have! Update content regularly. Provide news or access to current data on a particular issue via an e-newsletter or quarterly update or column.
- Ensure your website and email newsletters "mirror" and reinforce each other – In other words, ensure they relate information in similar formats, and that they meet your campaign and event needs. Email can be one of the best tools to drive traffic to your site – incorporate hyperlinks in your email to make it easy for folks to click through to your site.
- And the best time for e-news delivery? 65% of users subscribe to e-newsletters from their office. Studies of click-throughs and responsiveness to source websites show that you should send e-newsletters in the early afternoon, when workers are looking for a "break" in the day. The break you provide should take no more than seven minutes to read.

Remember, people who have signed up to receive your email newsletter have already taken action by opting to receive your information on a regular basis. They're interested in you and what you do. This means they're more likely to take action again – that might mean donating to your organization, or calling an elected official on behalf of your issue.

Marketing Your Website

Driving Visitors to Your Site

Having difficulty driving people to your website? Charities are using the Internet to reach new audiences, but research suggests that the lack of an investment of time and resources in marketing the site once it is finished will doom many important not-for-profit sites to failure before they even get off the ground.[11]

One thing that many newcomers to site development forget is that you must not only market your site online but also offline in order to "drive eyeballs" to the target destination. Again, this depends greatly on your target audience. If you are trying to mobilize youth, you may find outdoor advertising or collateral materials like stickers and posters will pique their interest. For decision-makers, they may need to see your website featured

On Line Action Tools

Consider these features for your website:

- Online Action Tools. You can make your website a powerful action tool with the addition of online action tools – web-based tools that help your members take action on issue by sending a fax, email or other communications to key decision-makers via your web site.
- Fax functionality. Ease of use is key with the web. If you are looking for action, make it easy for your target users and add fax functionality to your site. This means that the user will be able to use your website to send a free fax to a decision-maker.
- Email contacts for Members of Parliament, Members of Legislative Assemblies, and other decision maker audiences. Make the phone numbers, e-mail addresses, and "snail mail" addresses of your elected officials, corporate leaders or other target decision-makers available on your website, as well as suggested message points for direct calls, emails and letters.
- "Contact the editor." WildCanada.net has created a web tool that allows users to type in their postal code and then make contact with the editor of their local newspaper in order to send a letter. A great tool that, again, makes things easy for the on-line activist.

prominently on a billboard close to their riding office, or perhaps mentioned in an article in your daily newspaper. Much depends on the inclinations and habits of your user. Research will help you figure out the best "marketing mix" for reaching your audiences. Here are a few ideas for driving traffic to your site:

- Posters
- Events – rave, happenings
- News releases
- Outdoor advertising
- Display advertising
- Stickers
- Online marketing
- Site registrations
- Online media
- Banner advertising
- Link sharing
- Viral advertising with e-cards

References:

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[2] Statistics Canada, Plugging in: The increase in household Internet use continues in 1999 (2000) Available at www.statcan.ca from the Products and services page, choose free publications.

[3] Mark Surman, Commons Group. From Access to Applications: How the voluntary Sector is Using the Internet (2001) Prepared for Government of Ontario, Ministry of Citizenship, Volunteer Action Online.

[4] Commons Group/ Communicopia.net "What are non-profits doing online? A survey" (2002) Non-Profit Internet Survey - Executive Summary.

[5] Meta Strategies Inc. (www.metastrategies.com) specializes in developing electronic strategies and Internet applications.

[6] Benchmark Porter Novelli, Survey of Canadian Media and the Internet (Fall 2001) www.bmporternovelli.com

[7] Nielsen Norman Group Designing Websites to Maximize Press Relations: Guidelines from Usability Studies with Journalists (2001) http://www.nngroup.com

[8] Benchmark Porter Novelli, Survey of Canadian Media and the Internet (Fall 2001) www.bmporternovelli.com

[9] Malcolm Gladwell. The Tipping Point: How Little Things Can Make a Big Difference (2000) Chapter Two: Are you a connector?

[10] Burston Marsteller: E-fluentials The Power of Online Influencers: Your Company's Newest Stakeholder Group http://www.bm.com/insights/e-fluent.html

[11] Mark Surman, Commons Group. From Access to Applications: How the voluntary Sector is Using the Internet (2001) Prepared for Government of Ontario, Ministry of Citizenship, Volunteer Action Online

Worksheet #6: Web Usability Questionnaire

This worksheet assesses how you and your organization use the Internet for research, communicating your campaigns and messages or for training and development.

1. **The organization I work for uses the web effectively.**
- Not applicable/ We don't do this
- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

2. **My organization uses the web effectively to reach and interact with volunteers.**
- Not applicable/ We don't do this
- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

3. **My organization uses the web effectively in training and development.**
- Not applicable/ We don't do this
- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

4. **My organization uses the web effectively in campaigns and grassroots activism.**
- Not applicable/ We don't do this
- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

5. **What do you find to be the biggest problems in using the Web?**
- Not being able to find the information I am looking for
- Not being able to efficiently organize the information I gather
- Not being able to find a page I know is out there
- Not being able to return to a page I once visited
- Not being able to determine where I am (i.e., 'lost in hyperspace' problem)
- Not being able to determine where I have been and where I can go (e.g., view portions of a web site, view click stream)

- It takes too long to view/ download pages
- Encountering links that do not work (i.e. linkrot)
- Encountering pages with bad HTML
- Getting errors
- Too much flash media
- Boring design
- Other

6. What do you primarily use the Web for? *(Please check all that apply)*

- Education
- Research
- Connecting with other communities/ Networking
- Activism/ grassroots organizing
- Gathering product information/ shopping
- Entertainment
- Work/Business
- Communication with others (not including email)
- Gathering information for personal needs
- Wasting time
- Other

7. Complete the following sentence in the way that comes closest to your own views: 'Since getting on the Internet, I have ...

- become MORE connected with people like me.
- become LESS connected with people like me.
- become EQUALLY connected with people like me.
- don't know/No answer.

8. Which of these groups have you become more connected to through the Internet? *(Please check all that apply.)*

- None
- People who share my political interests
- People who share my hobbies/recreational activities
- People who share my religion
- People in my profession
- People in my family
- People in similar life situations (e.g. self-help groups, support groups)
- Other groups

9. Which of the following Internet technologies do you consider "indispensable"? *(Please check all that apply.)*

- The World Wide Web
- Email
- Chat/Online discussion
- Internet phone
- Internet fax
- "Push" technologies (Pointcast, Castanet, Channels, etc.)

- Streaming audio over the Internet (Real Audio, etc)
- Video conferencing over the Internet (Net meeting, etc.), Digital signature/id cards (Verisign, RSA. Etc.)
- 3-D environments (VRML, Active 3D, etc.)
- Java/ Other technologies
- Listserv marketing/ mail
- Don't know

10. How do you find out about new WWW pages/sites? *(Please check all that apply)*

- Books
- Follow hyperlinks from other Web pages
- Internet search engines (e.g., Alta Vista, Lycos, etc.), Internet directories (e.g., Yahoo, McKinley, etc.)
- Usenet newsgroups
- Magazines/newspapers
- Signatures at end of email messages
- Television advertisements
- Friends/ associates
- Other Sources

11. How much time do you spend reading articles/ content on the web in a given day?

- 10 minutes
- 20 minutes
- 30 minutes
- 60 minutes
- 2 hours
- 5 hours
- other

12. Why do you save/print WWW documents that you view?
(Please check all that apply)

- Fear that document will no longer be available
- Use the information in the document offline
- Read document offline rather than online
- Want to use content in other document(s)
- Want to mimic format/HTML in other documents
- Distribute to others not online
- I don't print/save documents

13. How often do you browse with images/pictures turned off (image loading/show pictures option)?

- Under 25% of the time
- Between 26% and 50% of the time
- Between 51 and 75% of the time
- Over 75% of the time

14. **Please indicate which of the following Navigation/Search Services have you used in the past six months.** *(Please check all that apply.)*

- AOL NetFind
- Alta Vista
- Canoe
- Dogpile
- Bigfoot
- 411
- HotBot
- Lycos
- MetaCrawler
- Open Directory
- Yahoo
- Don't Know
- Other

15. **How many hours per week do you use your computer for work?**

- Less than 1
- 1 to 5 hours
- 5 to 10 hours
- 10 to 20 hours
- 21 to 40 hours/week
- Over 40 hours/week

16. **Which of the following connection speeds do you primarily use to connect to the Internet?** ***(Round to the closest value if necessary.)*** **If you access the Internet at home via a commercial provider, choose the speed from you to your Internet provider.**

- Less than 14.4 Kb/ 14.4 Kb/sec (modem)
- 28.8 Kb/sec (modem)
- 33.6 Kb/sec (modem)
- 56 Kb/ sec (modem)
- 128 Kb/sec (ISDN)
- 1 Mb/sec (T1)
- Faster than 10 Mb/ sec
- Do not know

17. **To what extent would you say you use the Internet to search for specific information? Would you say...**

- Most of the time
- Sometimes
- Seldom
- Never

18. **To what extent would you say you use the Internet to express yourself: to help you convey the right impression to others (either on-line or off-line)? Would you say...**

- Most of the time
- Sometimes
- Seldom
- Never

19. To what extent would you say you use the Internet to have "fun" and explore? Would you say...

- Most of the time
- Sometimes
- Seldom
- Never

20. The Web is a versatile tool. Please indicate how often you have used the Web for each of the following categories during the *past 6 months*.

...to access newsgroups?

- Daily
- Weekly
- Monthly
- Less than once a month
- Never

...to access online news?

- Daily
- Weekly
- Monthly
- Less than once a month
- Never

...to access reference materials?

- Daily
- Weekly
- Monthly
- Less than once a month
- Never

...to access research reports & projects?

- Daily
- Weekly
- Monthly
- Less than once a month
- Never

...to access online chat groups?

- Daily
- Weekly
- Monthly
- Less than once a month
- Never

...to access books?

- ... Daily
- Weekly
- Monthly
- Less than once a month
- Never

21. Would you be willing to participate in a test survey, once the site is up and running? Y N

Thanks for taking the time to complete this questionnaire. If you have any further comments or questions please fill them out in the lines below.

____
____
____
____
____
____
____
______________________________.

Resources

A Few Suggested Readings

The resources listed below are designed to add to your learning on a broad range of communications topics. You'll quickly note that many – if not most – of the items listed are available on the internet and without any cost. All of the links listed were still active as of January 2003. Don't delay in taking advantage of all of this useful information!

Advertising

- Goodman, Andy. *Why Bad Ads Happen to Good Causes: And How to Ensure They Won't Happen to Yours.* Santa Monica: Cause Communications, 2002.

  This publication – based on a review of as many as two hundred public interest ads published between 1990 and 2000 – is designed to help not-for-profits create more effective print advertising. It is available online – with your free registration – at http://www.agoodmanonline.com.

Diversity

- Toronto and Region Conservation Authority. *Human Connections: Multiculturalism and the Environment.* 10 min. Toronto and Region Conservation Authority, 2000. Videocassette.

  This award winning video focuses on how to integrate the interests of diverse populations into your environmental planning. It is available at a cost of $20.00 and by contacting the Conservation Authority by telephone at 416-661-6600 or via e-mail at ccirillo@trca.on.ca

Environmental Communication

- British Columbia Environmental Network. *The Activist Handbook: A Handbook to Help Community Groups and Concerned Citizens Working on Environmental Issues.* Vancouver, BC: British Columbia Environmental Network, 2000.

  This handbook gathers together a range of resources – on logistics, communication, and fundraising – designed to be of use to environmental organizations. It's available for $5.00 through the organization's website at http://www.bcen.ca.

- Day, Brian A., and Martha C. Monroe. Eds. *Environmental Education & Communication for a Sustainable World: Handbook for International Practitioners.* Washington: Academy for Educational Development, 2000.

  This manual covers a range of topics important to the development of effective communication programs in an international development context. According to the Greencom website – at www.greencom.org –"this manual was designed for those who make policy and design programs that affect people and the environment." It's available online at http://www.greencom.org/greencom/pdf/eec_book/whole/handbook.pdf.

- Dement, Polly. *River Talk: Communicating a Watershed Message* (Portland, OR: River Network, 1998).

  This publication contains lots of solid information on a range of strategic communications planning issues. It's available through the organization's website – at a cost of US$15 – at http://www.rivernetwork.org.

Strategic Communications / Planning

- Bales, Susan, and Peg Odell. *Values and Voice: Advancing Philanthropy through Strategic Communications*. Washington, DC: The Communications Network and Benton Foundation, 1998.

This working paper consists of two parts. The first examines the concept of strategic communications in the not-for-profit context. The second part showcases six foundations that are looking at the role of strategic communications in advancing grantmaking and public policy goals. It's available online at through the Benton foundation website at http://www.benton.org/Stratcom/ValuesandVoice.pdf.

- Bonk, Kathy, Henry Griggs, and Emily Tynes. *The Jossey Bass Guide to Strategic Communications for Nonprofits.* San Francisco: Jossey Bass Publishers 1999.

  This is a comprehensive and contemporary guide through a range of fundamental communications issues.

- Kirkman, Larry, and Karen Menichelli. Eds. *Strategic Communication for Nonprofits.* Washington: The Benton Foundation, 1992.

  This is a "best practices" toolkit produced by the Benton Foundation and designed to assist not-for-profits to achieve their organization's mission.

- Janel Radtke. *Strategic Communications for NonProfit Organizations: Seven Steps to Creating a Successful Plan*. New York: John Wiley & Sons, 1998.

  This book outlines a 7-step process to developing a communications plan – starting with defining your mission through to evaluating your success.

- Wolf Kristen. *Now Hear This: The Nine Laws of Successful Advocacy Communications.* Washington: Fenton Communications, 2001.

  This publication – produced by Fenton Communications, an issue-oriented public relations firm located in Washington D.C. – offers a very insightful look at some communication fundamentals, from establishing your goals to effectively making your case.

- Ryan, Charlotte. *Prime Time Activism: Media Strategies for Grassroots Organizing*. Boston: South End Press, 1991.

  This book contains an excellent analysis of the barriers to "challenger" groups in accessing the mainstream media, as well as strategies for success.

- Saasta, Timothy. *How to Tell and Sell Your Story Part I: A Guide to Media for Community Groups.* Washington: Centre for Community Change, 2nd edition, 1999).

  This publication provides an array of useful information about how to approach the media. It's available online at www.communitychange.org/Publications/CCCNews 18.pdf

- Saasta, Timothy. *How to Tell and Sell Your Story Part II: A Guide to Developing Effective Messages and Good Stories about Your Work.* Washington: Centre for Community Change, 1998.

  Although this booklet focuses particularly on housing issues, it also contains excellent information on developing messages that will work for you organization and issue. You'll find it online at www.communitychange.org/Publications/CCCNews20.pdf

- Salzman, Jason. *Making the News: A Guide for Nonprofits and Activists,* (Boulder CO: Westview Press, 1998).

  This is a how-to primer on how the media work and how to influence them. Drawing on interviews with over 50 professional journalists, Making the News describes how media-savvy activists devise stunts and create imagery to propel their causes into the news. Please be aware that a new, updated paperback edition will be available as of June 2003.

- Ura, Michael and West Coast Environmental Law Association. *Making the News: A Guide to Using the Media*. Vancouver, BC: West Coast Environmental Law Foundation, 1992.

  This short media guide covers the basics. It can be obtained for $5.00 plus postage, and by contacting the foundation at 604-684-7378.

- Lawrence Wallack et al. *Media Advocacy and Public Health*. New York: Sage Publications 1993.

  This publication is still considered to be the “bible” of media advocacy.

Websites:

- The Greenroom – Media Training for Environmentalists – at http://www.green-room.org/index.html – is provided by Environmental Media Services, a Washington, DC-based not-for-profit organization dedicated to providing the media with latest environmental news. This website provides basic media training with the aim of demystifying the news process for activists, helping both you and the media in the process.

- The Spin Project – at http://www.spinproject.org/index.html – is dedicated to providing organizations with media resources, tips and tools to assist them with their PR efforts. The spin project website offers a number of tools designed to support social change work.

Social Marketing Resources

- Tools of Change – at http://www.toolsofchange.com – offers a planning guide, tools, and over 75 health and environmental case studies for organizations dedicated to helping people to adopt practices that are health or environmentally-friendly.

- Community Based Social marketing – at http://www.cbsm.org – includes a database of behaviour change tools and case studies, a discussion forum and an online book on CBSM.

Public Opinion Research

- Sharken Simon, Judith. “How to Conduct a Focus Group,” The Gransmanship Center Magazine, Fall 1999, http://www.tgci.com/publications/99fall/conductfocusgp.html.

  This brief article – based on her book – provides a step-by-step look at developing a focus group.

- Sharken Simon, Judith. *The Wilder Nonprofit Field Guide to Conducting Successful Focus Groups*. Minnesota: Amherst H. Wilder Foundation, 1999.

  This is a step-by-step guide – with worksheets – detailing how to develop and conduct your own focus groups from start to finish – without professional assistance or a large budget.

- Taylor-Powell, Ellen. *Questionnaire Design: Asking Questions with a Purpose.* Wisconsin: University of Wisconsin – Extension, Cooperative Extension, May 1998.

  This document is available online at http://www1.uwex.edu/ces/pubs/pdf/G3658_2.PDF.

Website Development Resources

- The Benton Foundation website – at /Resources/home.html – offers a long list of strategic resources – including – at http://www.benton.org/Practice/Toolkit/ -- a best practices toolkit for achieving your organization's mission in the digital age.

- CompuMentor – at http://www.compumentor.org – is the largest non-profit computer assistance organization in the US. Check out their web resource for nonprofits – Tech Soup at http://www.techsoup.org.

- The Institute for Politics, Democracy and the Internet – at http://www.ipdi.org/publications.html – makes available online a number of interesting publications on the topic of online campaigning. (The Institute is part of the Graduate School of Political Management of the George Washington University in Washington, DC.)

- MediaChannel.org – at http://www.mediachannel.org – offers an excellent series of articles on media access tips and tools for activists.

- Mindshare.net –at http://www.mindshare.net – is a US firm that specializes in assisting advocacy organizations in developing strategic web campaigns. Check out their report on how decision-makers in the Beltway use email and their guide for retrofitting your current website.

- NetAction – at http://www.netaction.org/training – offers *The Virtual Activist 2.0,* an online resource for activists who want to integrate the web into their organizing and community outreach efforts.

- ONE/Northwest (Online Networking for the Environment) – at http://www.onenw.org – is a nonprofit organization providing technology assistance to conservation activists and organizations in the Pacific Northwest. Their *Activist Toolkit* – http://www.onenw.org/bin/page.cfm?secid=5 – is available without charge on their site – helps people get online, use email, the Internet and other communication tools.

- useit.com: Jakob Nielsen's Website – at http://useit.com – is an excellent source of information about usability and how web users best receive your content.

- Volunteers Online.ca – at http://www.volunteersonline.ca – is an organization that provides a free online volunteer matching service for nonprofits and IT volunteers.

GETTING THE MESSAGE OUT: A Step By Step Communications Guide For Environmentalists

Every day, across this country, a myriad of organizations is engaged in the vital work of protecting our environment and our heritage.

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This guide is a joint project of the Sustainability Network and IMPACS: the Institute for Media, Policy and Civil Society.

IMPACS is a Canadian charitable organization committed to the protection and expansion of democracy and the strengthening of civil society. IMPACS believes a strong democracy requires an articulate and vocal civil society, an accountable and accessible media and government policies that foster democratic development. We provide communications training and services to not-for-profits; support and build programs to strengthen communications between not-for-profits, government and the media; and, address issues that support the participation of civil society organizations in public policy debates.

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