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Strategic Communications for Nonprofit Organizations

Seven
Steps to
Creating a
Successful
Plan

S e c o n d E d i t i o n

Sally J. Patterson Janel M. Radtke

Strategic Communications for Nonprofit Organizations

**SEVEN STEPS TO CREATING
A SUCCESSFUL PLAN**

Second Edition

**Sally J. Patterson
Janel M. Radtke**



WILEY

John Wiley & Sons, Inc.

*Dedicated to my grandson
Benjamin Sandoval
who taught me the wonder of magic minutes.*

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In 1993, Janel Radtke inspired me with her vision of a program designed to help nonprofit executives think more strategically about using communications to advance their mission. I became an advocate and a collaborator as she sought to interest others in making this dream come true. With support from Frank Karel, Joan Hollendonner and Vicki Weisfeld of the Robert Wood Johnson Foundation, an interdisciplinary team was convened to answer the question, “What should every nonprofit executive know about communications in order to leverage his or her work?” A theoretical framework was designed, a workshop model was crafted, and templates for a strategic communication plan were created. Janel, Tamar Abrams and I took the model on the road and worked with RWJF grantees and others to test and refine that model.

This book is built on the core principles of the Radiant Communications model—mission driven, audience focused, and action oriented.

In the 10 years since Janel’s death, our model has evolved, and the training team has grown. I would like to thank Tamar Abrams, Linda Cummings, Sam Davis, John Fairbanks, Buddy Gill, and Steve Otto for the many memorable moments we shared. We brainstormed, collaborated, and challenged each other to ensure that we gave our clients the very best communications tools and expertise. Priscilla Cavalca and Todd Nedwick managed the workshops and follow-up and allowed the team to focus on our work and the needs of the participants.

Books are written in isolation but become manuscripts, page proofs, and, ultimately, books with the help of talented editors. My thanks to Susan McDermott, Senior Editor, and Natasha Andrews-Noel and Lisa Vuoncino, Production Editors, of John Wiley & Sons, for their guidance, support, and advice throughout this process.

Since those early days, hundreds of nonprofits have followed the Radiant model and risen to our challenge to create bold and integrated communications strategies. This book is dedicated to them and the thousands of individuals who work at nonprofit organizations trying to make our world a better place. You are my inspiration.

Contents

About the Author	xi
Preface	xiii
Chapter 1 Getting the Most Out of This Book	1
Intended Audiences	1
Strategic Communications Plan Framework	1
Structure of the Workbook	3
How to Use This Workbook	4
How to Use the Web Site	5
Readiness for Strategic Communications Planning	5
Chapter 2 Strategic Communications Planning Process	7
Why Strategic Communications Matters	8
Benefits of Strategic Communications Planning	8
Roles and Responsibilities in Strategic Communications Planning	9
Communications Action Team	11
Communications Audit Team	14
Crisis Communications Planning	16
Crisis Communications Team	17
Crisis Control Team	17
Take the Time, Make the Time	19
Chapter 3 Step One: Preparing to Plan: Essential Building Blocks	25
Strategic Communications Is Grounded in the Mission	26
Task One: Review the Organization's Mission Statement	26
Task Two: Review the Organization's Program Goals, Objectives, and Financial Priorities	29

vi Contents

Communications Audit	31
Purpose of the Communications Audit	33
Components of a Communications Audit	34
Conducting the Communications Audit: Methodology	34
Task One: Plan the Audit	34
Task Two: Conduct Interviews	35
Task Three: Inventory and Analysis	35
Task Four: Present Findings	37
Task Five: Conduct Additional Research (Optional)	38
 Chapter 4 Step Two: Foundation of the Plan: The Situation Analysis	 43
Internal Analysis	44
Organizational Culture	44
Administration	45
Programs	46
Human Resources	46
Infrastructure	46
Development	47
External Analysis	48
Demographic Forces	48
Economic Forces	49
Political Forces	49
Technological Forces	49
Social Forces	49
SWOT Analysis	50
Critical Community Partners and Stakeholders	53
 Chapter 5 Step Three: Focusing the Plan: Target Audiences	 65
Understand Your Audience	67
Demographic Information	69
Geographic Information	69
Psychographic Information	70
Leadership Potential	70

Profile Each Priority Audience	71
Research Your Audience	72
Media Review	72
Readership Surveys or Membership Questionnaires	72
Piggyback Surveys	72
Exit Interviews or Evaluation Surveys	72
Informal Discussions	73
Focus Group	73
 Chapter 6 Step Four: Fostering Audience Support: Communications Objectives	 77
The SMART Test	80
Cycle of the Communications Process	81
Create the Communications Objectives	82
Communications Objectives: Some Examples Using the Cycle of Communications	83
 Chapter 7 Step Five: Promoting the Nonprofit Organization: Issue Frames and Message Development	 87
Define the Key Themes	89
Message Frames	90
Media Role in Framing	91
Episodic and Thematic Frames	93
Conducting a Framing Analysis	93
Reframing	96
Reframing: Underage Drinking	97
Message Development	98
First Impressions	98
Organization Descriptions	99
Messages that Resonate	101
Building a Message Platform for the Organization	103
 Chapter 8 Step Six: Advancing the Plan: Vehicles and Dissemination Strategies	 113
Criteria for Selecting Strategies	113

viii Contents

Audience Responsiveness	113
The Organization's Relationship to the Audience	114
How the Strategy or Vehicle Will Influence the Audience's Perceptions	115
Controlling the Message	116
Effort to Implement	117
Budget Issues	118
Potential Uses with Other Audiences	119
Evaluating Existing and Potential Strategies for Meeting Communications Objectives	119
Case Study: Future Generations	120
Case Study: Planet 3000	124
Strategies and Vehicles to Meet Communications Objectives	127
Face-to-Face Meetings	127
Print	130
Electronic Communications	133
Audio Vehicles	136
Video	138
Web Sites	140
Strategic Use of Communications Vehicles	144
Alternative Media	145
Building a Comprehensive Portfolio of Communications Vehicles to Support the Communications Objectives	145
 Chapter 9 Step Seven: Ensuring that the Plan Succeeds: Measurement and Evaluation	 151
Performance Evaluation	151
Steps in the Evaluation Process	151
Concepts that Have Driven the Strategic Communications Process	152
Measuring Success in Achieving Communications Objectives	154
Tracking Communications Activities	154
Measuring Communications Impact	154
Evaluation Tools	155
Monitoring the Progress on Communications Objectives	157
Finalize the Report	157

Chapter 10 Pulling It All Together: Creating the Plan	161
Building the Communications Plan	161
Putting It All Together	162
Creating Organizational Ownership	164
Messages to Support the Communications Plan	165
Tips for Building Support	166
Building the Case for Sustainable Capacity	168
Money: If It Is a Good Idea, You Can Sell It	172
Income-Producing Possibilities	174
In-Kind Contributions	174
Strategic Communications Plan Template	177
Appendix 1 Planet 3000 Strategic Communications Worksheets	211
Appendix 2 Essential Communications Tools	249
Appendix 3 Elements of a Style Manual	253
Appendix 4 Expanding the Organization's Coalitions and Partnerships	255
List of Worksheets	263
Suggested Resources	265
Index	267

About the Authors

Sally J. Patterson is the president of Radiant Communications, a strategic communications firm that counsels nonprofit leaders on organizational issues including board development, communications planning, executive coaching, and leadership transitions. Based in Washington DC, she has more than 25 years of strategic communications and public policy expertise including 10 years with public opinion research firms. She has provided strategic communications consultation and training to more than 700 nonprofit organizations.

Radiant Communications is a team of innovative professionals who challenge organizations to create bold and integrated communications strategies. Our approach is marked by a commitment to provide clients with the analytical and management expertise necessary to achieve their mission and advocacy goals. For more information, see our Web site at www.radiantstrategies.com.

Janel M. Radtke was the founder and first president of Radiant Communications, Inc. In this role, Janel worked with nonprofit organizations assisting them in the planning, creation, implementation, and evaluation of their communications. Prior to launching Radiant Communications, Ms. Radtke was the first executive director of the Center for Strategic Communications, where she educated nonprofits about the creation and utilization of a strong and dynamic communications environment. Before joining the Center, Ms. Radtke was vice president for communications at Planned Parenthood Federation of America and co-founded the New York Law School's Communications Media Center. Ms. Radtke died in 1999.

Preface

Strategic Communications as a Way to Effect Social Change

Communications is about building understanding. It is about nurturing change. When a national tragedy, like the bombing of the World Trade Center or Hurricane Katrina, occurs and we watch television coverage or read news accounts but also discuss the matter with friends and colleagues, we are changed. When an issue is discussed and decided by the local school board, we are changed. When we attend a rally, read a book, participate in a conference, we are changed. Social change, political change, community change . . . *change* is the business of the nonprofit community.

Strategic communications is the key to successful social change. It is mission driven, audience focused, and action oriented. It is the art of expressing ideas combined with the science of transmitting information. It is crafting the message so that it motivates target audiences to act in a desired manner. It integrates all aspects of the nonprofit organization—public education, programs and services, advocacy, membership, and fund-raising—into a single cohesive and potentially powerful mechanism. It helps to project a positive image of the organization, focuses public attention, strengthens community partnerships, and maximizes scarce organizational resources to achieve social change.

Today's communications environment is fast-paced, chaotic, and complex. Many people feel overwhelmed by the mix of media, the bombardment of messages, and the intensity of the emotions, promotions, and proclamations from advertisers, media mavens, and commercial and for-profit interests. Nonprofit organizations face an immense challenge in trying to attract attention for their missions and their messages.

There is no general public anymore, only target audiences, key constituencies, and influentials who, by virtue of their education, income, and activism, have a more powerful impact on community affairs and public policy than their numbers would suggest. New electronic, wireless, and online communications options have presented us with dozens of new

strategies to consider, thereby making the communications process more challenging.

Strategic communications plans are organic documents. They are frameworks that drive the work of the organization. They are active staff directives, and they do not belong on a shelf. Circumstances surrounding the nonprofit organization's communications change almost daily, and so should the communications plan. The plan is a reminder to the organization, its staff, and its board to routinely challenge itself:

- What are we trying to achieve?
- Whom are we trying to reach?
- What do we want them to do?
- How do we encourage them to do it?
- How will we know if we have succeeded?

By maximizing resources, focusing on potentially supportive audiences, and conveying the value, services, and impact of the organization—by being strategic about communications—the nonprofit can achieve positive social change, fulfilling its mission, advancing its programs and policies, and making its value known.

CHAPTER 1

Getting the Most Out of This Book

S*trategic Communications for Nonprofit Organizations: Seven Steps to Creating a Successful Plan* offers a conceptual framework and a step-by-step process for developing a strategic communications plan for the nonprofit organization. It is based on the core principles and approach developed by Radiant Communications, Inc., and our training teams, in partnership with hundreds of nonprofit clients.

Intended Audiences

This workbook is written to help nonprofit boards and staff to develop effective communications strategies and work plans. For seasoned communications professionals, it offers a useful refresher on communications principles and a source book of fundamental concepts and techniques. For those without experience, it offers an introduction to strategic communications planning, tools for addressing communications challenges, and a template for developing a strategic communications plan to achieve the goals of the organization.

This book is also directed to grant makers in an effort to help them understand how integral communications is to the success of the programs they fund. When a grantee practices strategic communications, a foundation's investment is leveraged because the impact of that grant is greater than it would have been without the communications component. Nonprofit organizations are in the communications business—and that means their work is not only about *what happened* but also about *what is happening, what the organization wants to happen, and why*. Communications efforts cannot occur after the fact; they must be ongoing and woven into the fabric of the programs to which the organization and the foundation are committed.

Strategic Communications Plan Framework

The strategic communications plan is an implementation strategy to help the organization achieve its programmatic goals. It is a companion to the

2 Getting the Most Out of This Book

organization's strategic plan and builds on the mission, vision, program goals and objectives, and business plan of the organization. The communications planning process sets measurable goals for reaching, informing, and motivating the audiences that are essential to the organization's mission.

The seven steps to the strategic communications planning process are:

Step One: Preparing to Plan: Essential Building Blocks. Effective strategic communications plans depend on an organization's willingness to ask the tough questions, to consider the possibilities of bold actions, to be disciplined about the allocation of resources, to be diligent in the pursuit of community partnerships and donor support, and to be persistent in the implementation, monitoring, and evaluation of the plan. Before engaging in strategic communications planning, the nonprofit organization should set clear goals for the planning process; should determine roles and responsibilities for the chief executive officer, senior staff, and board; and should decide whether outside allies should also be included in the process. The formation of a communications action team (CAT) will facilitate the planning process and ensure that the planning does not get bogged down.

Step Two: Foundation of the Plan: The Situation Analysis. The strategic communications plan supports the work of the organization. It must reflect the mission, goals, objectives, and strategies that the organization has established for fulfilling its vision. For that reason, the strategic plan needs to reflect the environment surrounding the organization, including an analysis of the internal and external forces affecting the organization. The internal analysis examines the organization's operations and identifies its strengths and weaknesses. The external analysis examines the outside forces that influence every organization and seeks to identify immediate opportunities and threats.

Step Three: Focusing the Plan: Target Audiences. Successful communications plans put the information needs and preferences of the audience first. This step asks the question "Whom do we need to succeed?" Nonprofit organizations need to focus their communications efforts and resources on those who are already engaged in work that matches the organization's mission, those who already care about the issue, and those who can be easily prepared to become involved in the issue.

Step Four: Fostering Audience Support: Communications Objectives. Communications objectives define what is expected of each target audience and speaks to the question "What do we want them to do?" Successful communications objectives are SMART: Specific, Measurable, Appropriate, Realistic, and Time-bound. Without these five elements,

communications objectives are only wishes and the strategic plan is but a dream of what could be.

Step Five: Promoting the Nonprofit Organization: Issue Frames and Message Development. Message development is the component of strategic communications planning that ensures that the target audiences are motivated to take the actions that will support the organization's mission. Effective, persuasive messages must inform, motivate and involve audiences. Messages must be mission driven, audience focused, and action oriented.

Step Six: Advancing the Plan: Vehicles and Dissemination Strategies. An effective communications plan relies on coordinated dissemination strategies that utilize all five forms of communication: face-to-face, print, audio, video, and electronic communications. The plan must reinforce the mission, values, and messages in several different formats for maximum impact on each target audience.

Step Seven: Ensuring that the Plan Succeeds: Measurement and Evaluation. Knowing the success measures for the communications plan ensures that staff, board, volunteers, and others remain focused on what needs to be done and why. Clear impact measures, established at the beginning of the planning process, make it easier to ascertain what is working, what needs to be changed, and what can safely be abandoned.

After these steps have been completed, the worksheets are transferred into a written plan that includes:

- An executive summary or overview of the plan
- The organization's mission and value statements
- The communications objectives
- Clear communications strategies and dissemination plans for each priority audience
- Key messages
- Main products and services to be developed
- A budget
- An implementation plan (with timeline)
- Clear benchmarks for evaluating success

Structure of the Workbook

The workbook is organized to follow the flow of the strategic communications process. Each chapter outlines the basic principles and approach necessary to complete the step. Within each chapter are *guiding questions* to allow the organization to quickly assess its needs and objectives for each step in the process, followed by comprehensive worksheets to provide the

4 Getting the Most Out of This Book

building blocks for the strategic communications plan. Blank worksheets are included at the end of each chapter as well as on the dedicated Web site associated with this book (www.wiley.com/go/nonprofitcommunications2).

In addition, each chapter includes *Checklists* and *Rules of the Road* to help direct the CAT through each step. Case examples and a template for the strategic communications plan are also provided to illustrate various components of the communications plan and to demonstrate how it all pulls together into a working plan of action.

How to Use This Workbook

This book is a helpful overview of the strategic communications planning process. The reader should review it in its entirety to understand the core concepts and the relationship between each of the steps toward building the comprehensive plan. At many points in the process, the desired outcome might suggest alternative courses of actions. In order to make the best choices, being familiar with the flow of the strategic communications process is invaluable.

Nevertheless, there are also circumstances in which an organization is focused on a particular challenge or problem, such as the need to respond quickly to a communications challenge or crisis. When resources are limited, when time is short, or when the organization is facing an immediate and particular problem, this workbook can also guide the reader through a targeted response. Specifically, the book contains methods for establishing a crisis response strategy for emergencies and controversies and a communications audit for helping an organization pinpoint specific challenges that may benefit from a more tailored response. In those circumstances, the guiding questions and targeted use of the worksheets may serve the needs of the organization well.

Throughout the book, it is assumed that the work will be done by a communications action team. More hands and minds will strengthen the process and ensure that the strategic communications plan is competed and implemented by the entire organization. However, there are times when the burden for this type of planning falls to a single individual. In these cases, as you complete the worksheets and the plan, test your hypotheses from the perspective of others in the organization: board, stakeholders, staff, volunteers, and clients.

Whether the workbook is used in its entirety or only to focus on a particular challenge, the principles and tools provided are designed to improve the effectiveness of the communications and outreach efforts of the nonprofit organization. When carefully completed and applied, the seven steps are designed to support the nonprofit organization in its efforts

to achieve its mission and to promote lasting social change. Applying the practical tools, in whole or in part, will improve the communications practices and advance the work of the nonprofit organization. They are presented to encourage nonprofits to focus on the possibilities.

How to Use the Web Site

The worksheets, Strategic Communications Plan template, and the Planet 3000 case study are also available at a dedicated Web site. It can be found at www.wiley.com/go/nonprofitcommunications2. These templates can be easily downloaded for your individual use, the use of your communications action team (CAT) and to introduce the model to the board, senior management, and other stakeholders.

Readiness for Strategic Communications Planning



Worksheet 1 found at the end of this chapter can help the organization determine its communications needs and focus its planning process. This checklist is designed to help senior management and/or the board determine where to put their energies in addressing the communications needs of the organization. This exercise can be done collectively by senior staff, the executive committee of the board, and/or the entire board. Results of this assessment should be shared broadly to generate interest and build support for the strategic communications planning process.

6 Getting the Most Out of This Book

Worksheet 1 Readiness for Strategic Communications

Key

Y = Yes, in place NW = Needs more work N = No, not in place

- | | |
|------------|--|
| Y NW N | 1. Does our organization have a clear strategic vision that supports our mission and guides our communications work? |
| Y NW N | 2. Is our mission statement a concise, accurate description of what our organization is and the work that we do? |
| Y NW N | 3. Does our organization have a strategic plan that guides the staff in its communications and outreach efforts? |
| Y NW N | 4. If not, do we need to conduct a communications audit? |
| Y NW N | 5. Is our communications and outreach work successfully advancing the mission of our organization? |
| Y NW N | 6. Do we know who the priority audiences are? Do we know what we want them to do? |
| Y NW N | 7. Are our messages clear, concise and designed to motivate our priority audiences to take action? |
| Y NW N | 8. Do the strategies and communications vehicles that we use work in concert to achieve the maximum communications impact? |
| Y NW N | 9. Do we have a clear mechanism for monitoring and evaluating our communications work? |
| Y NW N | 10. Are our internal communications structures and strategies effective across the organization? |
| Y NW N | 11. Have we allocated sufficient resources to ensure the success of our strategic communications plan? |

Priorities for the Strategic Communications Plan

CHAPTER 2

Strategic Communications Planning Process

The term *strategic communications* describes the combination of plans, goals, practices, and tools with which a nonprofit organization sends consistent messages about its mission, values, and accomplishments. Under the strategic communications domain are a variety of activities that occur, to some degree, in most nonprofit organizations, including public education, advocacy, membership, programs and services, and fundraising. Depending on the organization's needs, strategic communications may also address issues such as branding the nonprofit, framing issues, and preparing for communication controversies and emergencies (crisis communications). Internal communications—within the board, within the staff, and between board and staff—are also an essential part of the process.

Communications is *strategic* when it is integrated, orchestrated, and ongoing. Frank Karel, founder of the Communications Network, describes it as “a process guided by the relentless pursuit of answers to deceptively simple questions: What do you want to accomplish? Who has to think or act differently for that to happen? What would prompt them to do it?”¹

Strategic communications persuades, moves, and convinces priority audiences and constituents to help an organization achieve its mission. How the organization articulates its mission, vision, values, and desired outcomes determines whom it draws as supporters, donors, volunteers, and community partners. How it presents itself to its constituencies, the public, opinion leaders, and others determines whether it can leverage resources to achieve the organization's mission. How it defines its issues and policies determines whether the public will become engaged and take appropriate actions.

¹Communications Network, www.commnetwork.org.

Why Strategic Communications Matters

Nonprofit organizations play a significant role in addressing community needs. Through effective community engagement, partnering with organizations that share the same agenda, and advocating before policy makers, nonprofit organizations ensure that the public attention is focused on the needs of the community. The strategic communications plan is an implementation strategy that helps the organization achieve its strategic goals. It is a companion to the overall strategic planning process that builds on the mission and vision statements. Communications planning establishes clear goals and objectives linked to specific programs and services.

It is important to remember that strategic communications is not about marketing, sound bites, spin, or campaign promises, nor is it about fancy brochures, glossy annual reports, and animated Web sites. Despite attempts by well-meaning board members and some public relations consultants to encourage the adoption of commercial marketing practices, the communications needs and challenges of nonprofit organizations are not well served by this approach. Advertising, marketing, and public relations are designed to help the for-profit sector expand market share and increase company revenues. Nonprofit organizations strive to maintain revenues and income streams as well, but the communications strategy of a nonprofit organization must be focused on advancing its mission and increasing the community base of support for its work. The challenge for nonprofits is to articulate their values clearly so that people can relate to the mission, connect to the underlying values, and commit to take action to support the organization.

An organization that takes a strategic approach to communications uses language that is simple, clear, and direct and crafts messages that are action-oriented. It targets its resources effectively to build public understanding, confidence, and loyalty. It must build public trust and individual commitment to its priorities. In extraordinary circumstances, it is public confidence that will help the nonprofit weather the crisis of the day or the unexpected bend in the road.

Benefits of Strategic Communications Planning

Strategic communications provides a framework that helps ensure that every staff and board member is working from the same set of assumptions and understands how their work fits into the broader work of the organization. A strategic framework can

- *Help in setting priorities and clarifying future direction.* As strategic communications becomes integrated, staff members will approach their work in a new way, routinely asking “Whom are we trying to reach,

what do we want them to do, and how will we know if we have succeeded?’’ Board members will have a framework for assessing the progress of the organization and for determining how they can integrate their efforts into the organization’s work.

- *Improve performance and stimulate creative thinking.* When everyone on the staff and board understands why certain audiences are important and what actions the organization wants from those audiences, it is easier to focus planning and creativity on common objectives.
- *Build teamwork and expertise.* When an organization highlights the synergy of communications activity with all aspects of its work, communications staff, program staff, and development staff begin to collaborate and share information in new ways. They look for ways to set priorities, coordinate resource allocation, and improve internal communications.
- *Use limited resources effectively.* By setting clear, consistent messages and determining priority audiences and dissemination strategies in advance of launching projects, staff members can maximize the opportunity to combine messages and to use certain communications vehicles with multiple audiences. Considering the value of the investment against desired impact may encourage an organization to issue a straightforward annual financial report instead of spending scarce communications resources on a glossy annual report. Instead of a set of brochures targeting volunteers, prospective donors, community supporters, and others who might care about its work, an organization may be able to weave all of those opportunities, messages, and themes into a single brochure.

Roles and Responsibilities in Strategic Communications Planning

The staff, with leadership from the chief executive, has primary responsibility for developing and implementing the strategic communications plan. The board inspires and guides communications planning and is involved in certain aspects of its implementation. The board is also responsible for monitoring the impact and success of the strategic communications plan to ensure that it supports the overall mission and strategic direction of the organization. Exhibit 2.1 outlines the different roles and responsibilities for board and staff throughout each of the steps of the strategic communications planning process.

To ensure that the strategic communications planning process stays on track and is not overtaken by other, more immediate organizational priorities, it is important to create a command team to take leadership of the

10 Strategic Communications Planning Process

Exhibit 2.1 Strategic Communications Planning: Board versus Staff Roles

Task	Board Role	Staff Role
Review of Mission and Goals	Every 3 years, board reviews staff recommendations for new goals and program objectives.	Staff members develop recommended goals and program objectives for the board to review and ratify.
Situation Analysis	Review the analysis prepared by staff. Supplement with its own perspectives on the needs and trends influencing the work of the organization.	Compile data that examines the political, economic, social, demographic, and technological factors that affect the organization.
Audience Identification	Identify key audiences to be included in the strategic communications plan.	Identify key audiences to be targeted through the organization's activities.
Message Development	Support staff in developing tailored messages to meet the information needs of the targeted audiences.	Develop and propose messages to be used with priority audiences; work with the board to ensure that the messages will be effective.
Plan for Communications Vehicles	Monitor and evaluate the quality and effectiveness of the communications vehicles. Use the materials in its outreach on behalf of the organization. Provide feedback on the effectiveness of the materials.	Develop a production plan for the development of communications vehicles, including the design elements to support the goals of the communications plan.
Timeline and Budget	Ensure adequate resources to fulfill the plan.	Prepare the program plan and budget. Set realistic time frames for action.
Monitoring and Evaluation	Review the reports prepared by the staff; evaluate own performance in supporting the plan. Look for additional ways to support the work of the staff.	Prepare routine reports for the board's review; make recommendations for modifying the strategic plan based on results and newly emerging needs.

SOURCE: Sally Patterson, *Generating Buzz: Strategic Communications for Nonprofit Boards* (Washington, DC: BoardSource, 2006), p. 60.

communications planning process. Three alternative planning teams are possible, depending on the scope of the communications needs of the nonprofit organization:

1. A communications action team (CAT) if the organization is prepared to launch the strategic communications planning process
2. A communications audit team if a review of the current state of the communications work is all that is desired
3. A crisis communications control team, if the organization is preparing a contingency plan for responding to crises and controversies

Communications Action Team

To ensure that the strategic communications planning process moves forward in a systematic way, it is important to designate a staff team with responsibility for creating the process, monitoring progress, engaging broad participation, and ensuring momentum. One way to secure the necessary involvement to support the strategic communications plan is to create a communications action team (CAT) charged with all facets of the organization's communications effort.

All too often the individuals within the organization who are most enthusiastic about pursuing a strategic communications plan fail to reach out for help; or if they do, they ask staff members who have the most on their plates and are hard-pressed to take on yet another commitment. Creating a CAT expands participation, provides multiple perspectives, and grounds the plan in the fiber of the organization's work.

Because a communications plan is a "living" thing—it is not something to be completed one week and put away until next month—it will require continued effort on the part of those most directly involved. Even if it is a single phone call or listserve posting, some action should occur with the plan every day.

What the CAT Does. The CAT is in charge of doing the research—or working with outside experts to have it done—to create the communications plan. It is responsible for building the plan and securing buy-in from other constituencies within the organization. The CAT also implements the plan—supervises others who may be responsible for performing individual tasks that comprise the various strategies—and evaluates the effectiveness of the communications effort regularly to fine-tune and update the plan as needed.

The CAT should meet regularly (preferably once a week, but no less than once a month) during the development of the plan, via conference calls or face to face. At these meetings, team members should review and evaluate the different parts of the plan, not only to update each other on how the plan is unfolding but also to change direction when necessary.

Determine the Criteria for the CAT. There are four characteristics to consider when recruiting CAT members:

1. Expertise or skills
2. Attitude toward the organization's communications effort

12 Strategic Communications Planning Process

- 3. Character or personality traits
- 4. Current responsibilities within the organization

Different organizations—as well as the individuals leading the charge and advocating creation of a communications plan—will have different wish lists when it comes to the composition of the CAT. That is why it is useful to brainstorm with others inside the organization to determine who might best fit into the team and be willing and able to do the work. Make a list of the critical variables to determine what features are important for a successful CAT for the organization and for the challenges that it currently faces.

Although certain types of expertise or skills are essential for the team, other qualities may be just as important to the team’s success. For example, an excellent writer who does not easily share his or her ideas with others may not be a good CAT member.

In addition, it is important to recruit individuals from different departments or areas of the organization to ensure that all program goals and operational realities are being addressed within the communications plan, including internal communications, production schedules, budgetary considerations, and others. It may also be valuable to have a board member or a well-informed volunteer on the CAT to provide an external perspective on behalf of stakeholders.

Desired Qualities for CAT Members. The chart below lists characteristics that have proven to be important for potential CAT members. The leader for the strategic planning process, in consultation with the chief executive, should determine which characteristics will be most valuable to the process.

Expertise/Skills	Attitude	Character	Department/Program
Interpersonal skills	Enthusiastic	Team player	Communications
Writing	Good listener	Committed	Development
Public relations	Meets deadlines	Creative	Public affairs
Technology	Passionate	Leader	Administrative/Information management
Graphic design	Positive, “can-do”	Honest	Training
Connections	Aware of the power of language, images, symbols	Self-motivated	Volunteer services

Identify Potential Members for the CAT. Once the essential skills and expertise have been determined, it is important to consider the people within the organization who possess the right knowledge or expertise—or others who might be interested in volunteering their time to the effort. For example, someone who has been with the organization for a long time may know all of its communications assets but, just as readily, may be the one who says “We’ve tried that before and it didn’t work.” Who possesses the critical traits, skills, and expertise? It is important to identify potential candidates with the right mix of skills and character for the CAT and to invite them to join the project. If possible, when recruiting the members of the CAT, explain why they have been selected, what it is hoped they will contribute to the CAT, and the length and amount of time the strategic communications planning process is likely to take. If necessary, ask the person’s supervisor beforehand if it is possible to include this person in the CAT.

The CAT should consist of at least three people. The more people a team has, the stronger pool of resources it has for moving the plan. With more people, there is also a greater need for coordinating logistics and calendars. If your CAT is large (more than seven people), it might be necessary to break the team into working groups that mix and match people according to strategies or objectives.

Recruit Members of the CAT. Once the individuals have been selected based on the criteria identified as important for team members, use these questions to ensure that each member is able to meet the demands of the strategic communications planning process.

- Can the person commit sufficient time and attention for at least six months?
- Is the person comfortable as a team player?
- Can the person take charge of a task and get it done without supervision?
- Does the person usually meet deadlines?
- Is the person interested in learning more about communications tools, techniques, and strategies?



Worksheet 2, found at the end of this chapter, can be used to help form a communications action team (CAT).

Rules of the Road: Creating a Communications Action Team

1. The chief executive and the leader of the strategic communications planning process should review the suggested criteria listed above and determine the desired criteria for the CAT. Together, they should consider the departments and programs that should be represented and identify potential individuals for the CAT, being sure to factor in attitude and character considerations.
2. Recruit the members for the CAT, making sure that each recruit understands the time commitment and the expectations involved.

Communications Audit Team

As a first step in the strategic planning process, the CAT may determine that a communications audit is necessary. A communications audit is a comprehensive analysis of an organization's communications—internal and/or external—to review communications needs, policies, practices, and capacity in order to improve organization efficiency and effectiveness. The CAT may conduct the communications audit or determine that a separate communications audit team should be formed.

What the Audit Team Does. The communications audit team conducts interviews with top management and key internal stakeholders to determine their attitudes and beliefs about communication and to pinpoint communications problems. It collects collateral communications materials, conducts an inventory, and prepares an analysis of the communications products developed by the organization. This analysis includes all existing communications materials, communications vehicles, and programs: media kits, letterhead, fact sheets, brochures, publications, audio-visuals, Web material, and any other materials used by the organization. The team identifies communications issues that must be addressed by the organization in four key areas:

1. Management and production
2. Messaging and branding
3. Identification of efficient and effective communications tools
4. Techniques and issues to be addressed throughout the strategic communications planning process