



How this workbook works

Information is power.

That's why developing a smart and effective communications plan is so crucial. This workbook will help you lay out your communications game plan from start to finish by establishing your goal, target audiences, strategy, budget, timeline and tactics. Print it out, blow it up, project it. Gather your staff and fill it out together. You may have more fun than you think.



1. CLARIFYING YOUR GOAL: Where do you want to go?

Your long-term goal should be rooted in your organization's mission and vision. Charting a path to that goal can be a daunting task. You need to think of each of the smaller steps—the “pit stops”—that will ultimately lead to your final destination.

Establishing a clear goal is the first step. Think about what success looks like, and ask yourself, how will you know when you've won? The clearer and more specific your goal is, the easier it is to implement a route plan to achieve it.

GOAL

RESEARCH

DECISION MAKERS

AUDIENCE

VALUES

MESSAGE

MESSENGERS

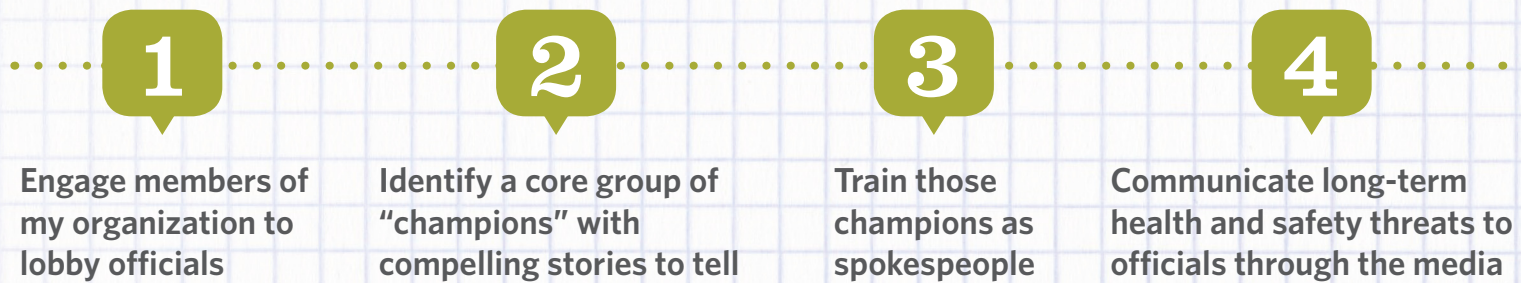
TARGET

TACTICS

FOR EXAMPLE:

My goal is to pass clean water standards at the state level.

The steps I need to take to get there are:



Once you have a clear goal, develop a campaign plan that includes all the elements you need to accomplish your goal: grassroots outreach, media work, legislative work – whatever it takes. A campaign plan will include your goal, shorter-term objectives and a strategy to accomplish those objectives. Your goal, the political environment, and your resources are all puzzle pieces that fit together to form your strategy—a careful plan for achieving a program’s desired goals.

A communications plan can be built on the basis of a strong campaign plan. But if you don’t have a campaign plan, communications planning can get tricky, and your original thinking easily derailed.

SOME QUESTIONS TO ASK YOURSELF AS YOU PUT TOGETHER YOUR CAMPAIGN PLAN:

HOW MUCH SUCCESS IS NECESSARY? Determining “how much success is necessary” is easy for corporations—they determine their “break even” point based on their bottom line and costs. This question may not occur to a nonprofit with a mission based on an ongoing progressive vision. Success for nonprofit groups can be incremental. As such, it’s important to gauge the level of achievement needed to ensure long-term success.

WHAT DETERMINES HOW MUCH SUCCESS IS NECESSARY?

The answer relies on a number of different factors:

- What needs to happen in order to make a significant difference? For example: How many square miles of ocean do you need to conserve to improve fish populations?
- What must be accomplished in order to satisfy the demands of key community leaders, supporters and funders?

WHAT SUCCESS MEASUREMENTS DO YOU CARE ABOUT?

Is it:

- Number of members?
- Number of volunteers?
- Number of donors and financial health of your organization?
- Successful passage of policy change?

WHAT WILL IT TAKE TO GET MY DECISION-MAKER TO TAKE THE DESIRED ACTION?**HOW MUCH AUDIENCE PARTICIPATION DO YOU NEED TO ACHIEVE YOUR GOAL? IS IT FEASIBLE?**

2. RESEARCH: Look Around You

What do the internal and external landscapes look like? This exercise helps you stay grounded in reality when designing your campaign. To do this, consider your internal and external environments, public perception and the media landscape. At the end of a campaign you can refer back to this initial research and see how your campaign may have changed the environment.

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EXTERNAL So you have an issue on your hands—is it an opportunity, a threat, or something with untapped potential? In order to move forward, your team needs a common understanding of the issue. One of the key ways to achieve that is by taking a look around.

Public opinion research: Understanding how people think about you and your issue.

Public opinion research is a great starting point for any communications campaign. Tools such as focus groups and polls can measure public opinion in broad brush strokes, or in a very specific way. Public opinion research can help guide you to answering these questions:

- Who's with you; who's not?
- Who are your supporters?
- Who are your opponents?
- What kind of social, political or economic landscape are you operating within?
- What are the top opportunities?
- What are the biggest threats?
- What messages are most persuasive?

What does the media think?

Looking at how your issue is covered in the media is key because media are the mechanisms that deliver your message. After a media audit and analysis, you can determine if the current media coverage needs to change, increase or stay the course.

Traditional and/or social media audits collect media coverage on a specific issue and analyze stories according to frame, messages used, prominent spokespeople, media outlet and favorability of coverage. They are typically used to establish a baseline at the start of the campaign. Multi-year campaigners should consider conducting yearly media audits to assess progress and adjust course as necessary.

When to use a media audit:

- When doing research to find out how the media has covered a specific issue—i.e. what angles are most common and which aspects have not been covered extensively
- To research “message discipline” among your spokespeople and make recommendations for improvement going forward
- To determine what messages the opposition has used in media coverage and how often they have used them

INTERNAL What about your internal capacities? An effective campaign plan considers the organization's internal strengths and weaknesses.

Ask yourself:

- What are your three greatest strengths?
- What are your three greatest weaknesses?
- What resources do you have to carry out a communications campaign (budget, time, skills, etc.)?
- What is your reputation with decision makers and key audiences?

3. DECISION MAKERS: Who can make it happen?

If you convince decision makers to take action, your goal gets accomplished. If not, it's back to square one. Zeroing in on whom you want to convince to take a particular action is a critical step in any communications plan.

Decision makers have the power and influence to achieve your organization's mission. For example, through changing or passing a law, upholding current policies or changing corporate practices.

Sample decision-makers:

- Government bodies
- Regulators
- Courts
- Corporations

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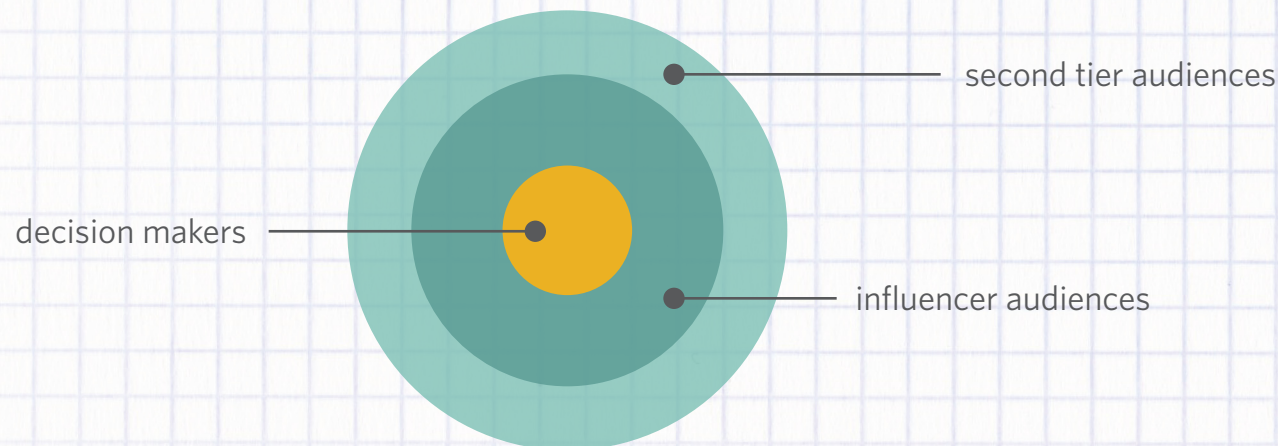
TACTICS

Considering that we live in a world where information is shared widely, it is likely that the general public will hear the message you are directing to your decision makers. Don't try to please everyone in the general public, however; your decision makers matter the most. There's no reason to waste time and resources trying to communicate with people who have no interest in – or power to help – your campaign or issues.

Your campaign can reach decision makers directly, through influencer audiences or the media. If you can't access influencers directly, go through second-tier audiences who can reach them.

When designating your decision makers and audiences, ask:

- Who can make it happen?
- Who influences them?
- Who will listen to the decision makers, and why?
- How will your decision makers benefit from taking action?
- Who are your opponents and competitors? Who listens to them and why?



4. AUDIENCES: Who influences your decision makers?

Decision makers don't act in a vacuum. Like all of us, they make decisions based on the opinions and wishes of the people around them. If they're elected or appointed officials, that's especially true. In order to convince decision makers to take action, you must either reach them directly or reach the people who influence them. These are your key audiences.

Identify your key audiences early in your communications planning. Determine which audiences influence which decision makers, as well as when and how they do it.

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GETTING YOUR OWN HOUSE IN ORDER

It's important that you have the confidence of these internal audiences first:

- Staff
- Board
- Funders
- Allies (groups and individuals)

Influencer Audiences These audiences will help influence your decision makers, either through structured roles or informally. Generally, influencers have the respect and confidence of the public and your decision makers.

- Community leaders, such as current and past electeds
- Media influencers, such as editorial boards
- Investors
- Special interest groups with clout, or lobbyists

Consumer Audiences Consumer audiences are your “boots on the ground,” and should be narrowly defined. Your decision makers will listen to their voices. They consume information via mainstream and social media. They also consume in the marketplace, making them a valuable audience for industry and business. Examples of consumer audiences include:

- Current members of your organization
- Secondary contacts of members
- Potential members
- Specific communities (for example, Latina female college graduates living in southern California)

Competing Audiences These audiences seek to reduce or undermine the success of your organization. Some of these audiences will never be swayed to your side, since they have an ideological opposition to your mission. You should not waste your time targeting your communications campaign toward them. But because these audiences will likely be directly engaging with your decision-making audiences and with the media, you should be aware of their activities and messages, so that you can be on the offensive in your communications planning. Potential competing audiences include:

- Special interest groups
- Industry
- Activists

5. VALUES: What do your audiences really care about?

Values are the fundamental bedrock upon which our opinions are based. Any given audience's values derive from personal experience, history, attitudes, needs and belief systems. If you shape communications strategy and messaging around your audience's values, you'll do a better job persuading them. Look for the places where your values overlap with those of your audience. Ask yourself:

- What are your target audiences' values?
- What compels them to act?
- What values are most easily aligned with your organization's mission?

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Years of research reveal how most people prioritize what they care about:

PRIMARY VALUES:	SECONDARY VALUES: *
Prosperity	Environmental stewardship
Family	Faith
Health	Respect for social norms
Safety	Patriotism
Freedom	Tolerance

*Depending on which audience, these may be primary

6. MESSAGE:

What are you going to say?

A message is your deliberate effort to convey an idea, shaped by your communications strategy. A simple, clear message will support your goals and resonate with target audiences. In order to be effective, it must appeal to people's emotions, as well as core, common values. These values might include family, health, prosperity, responsibility or faith.

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Research shows that messages are more effective if they “start where the audience is,” and line up with the audience’s own concerns or needs. Try drafting a first message. Then imagine the reaction, from the perspective of your various audiences. Put yourself in their shoes and ask, “What’s in it for me?”

MESSAGE DEVELOPMENT

A good message:

- Supports the campaign’s main goals
- Is not “spin” or a sound bite; it is a theme or idea designed to reach target audiences. It is reinforced by sound bites, phrases, statistics and anecdotes.
- Can be tailored for specific audiences while remaining consistent
- Should permeate all of your communications efforts, not just interactions with the media
- Is simple—no longer than a sentence or two
- Is repeated over and over again to have impact

TIP: Choose your words carefully—avoid jargon. Generally, it should be language that a 13-year-old would understand.

A good message is designed to answer the following three questions:

1

What values
are at stake?

2

What is
the threat?

3

What is the
solution?

7. MESSENGERS: Who's the best person to say it?

A message is only as good as its messenger. In order to resonate best, your message needs to be delivered by people your audience trusts. Who is doing the talking is just as important as what is being said, if not more so.

Often spokespeople—such as scientists, farmers, fishermen, or others—can change a story's frame by shifting the focus from arcane policy issues to values. They also provide credibility and expertise and can appeal to the core concerns of target audiences.

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Consider these questions when choosing your spokespeople:

- Who does your audience respond to or want to hear from?
- Are they currently on your side?
- What information do they need to be persuaded to join your side?

Years of research by social scientists have produced a good snapshot of effective communicators, summed up in:

"THE THREE C'S": CREDIBILITY, CHARISMA AND CONTROL ¹"

CREDIBILITY The power to inspire belief through demonstrated competence, status, expertise and honesty.

CHARISMA Familiarity and likability. Charisma also involves similarity to your target audience. This is particularly important when audiences want to hear from "people like them."

CONTROL Authority over a particular audience. This also applies to how well a spokesperson is able to control the message. It's not always easy!

¹ *Strategic Planning for Public Relations, Second Edition*, Ronald D. Smith, 2005.

8. TARGETS: How do you get the message out?

There are many ways to reach your audiences, including the news media, social media, online advertising, direct mail, etc.

Not all of the information that your organization has to offer will be appealing to every audience. When determining which information should be sent where, think about the agendas and interests of specific target audiences.

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Examples of some of the many ways to reach your audience include:

NEWS MEDIA:

Wire Services

Newspapers

- National
- Regional
- Community

Magazines

Websites

Radio

- News or feature stories
- Guest talk show format

Television

- News story
- Guest talk show format
- B-roll

DIRECT MAIL:

Newsletter that reaches your target audience, fundraising letter

SOCIAL MEDIA:

Twitter (tweets), Facebook (status updates), LinkedIn (status updates)

ADVERTISING:

Paid advertising in community newspaper, Google ads

9. TACTICS: What tools can make it happen?

Tactics are the means by which you reach different audiences. They could include organizing a town hall meeting or lobbying a particular subset of legislators. For the purposes of this communications guide, let's focus on media tactics.

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Examples of media tactics include:

TRADITIONAL MEDIA	NEW MEDIA
News conferences	Blogger outreach
Letters to the editor	Tweeting (Twitter)
Editorial board meetings	Facebook Fan page
Media tours	Comments (Facebook status updates or LinkedIn status updates)
Teleconferences	Viral Video
Radio interviews	
Radio actualities	
B-Roll for television story	

While it can be tempting to try out an exciting new outreach tool – like Twitter, for example – resist this impulse unless it's in line with the objectives and strategy you've established.

Putting it Together

Successful implementation of these tactics requires good research, planning and execution. This graph will help you do that.

	SCENARIO 1	SCENARIO 2	SCENARIO 3
GOAL <i>Is it specific and measurable?</i>			
DECISION MAKERS/ AUDIENCES <i>Who can help you achieve your goal?</i>			
VALUES/ MESSAGES <i>What's the threat? What values are at stake?</i>			
MESSENGERS <i>Who is credible to your cause?</i>			
TARGETS <i>How will you reach your audience?</i>			

REALITY CHECK:

10. How much time and money do I have?

When dealing with finite time and a limited budget, many groups face a dilemma as they wrestle with all of the different tactical options: how do you choose between satisfying existing audiences and recruiting new ones?

It all goes back to audience targeting and who your decision makers are. Who do you want to reach? What tactics are most effective at reaching those people? Prioritize your tactics accordingly!

Planning your budget can be done in terms of dollars, number of staff hours or both. Resource Media staff, when planning out campaigns, divide dollars into number of staff hours and hard costs.

Here is an example of how we scope out a project:

PRESS CONFERENCE	STAFF 1	STAFF 2	STAFF 3	STAFF 4	TOTAL \$
ORGANIZE PRESS TELECONFERENCE	1			1	
Distribute advisory and release	3				
Pitch calls, follow-up with editors	22		2		
Preparing spokespeople for actual meetings	3.5				
Hosting teleconference for press and bloggers	2				\$ XXX
REVIEW PRESS MATERIALS					
Advisory	1				
Pitch letter	1				
Press release	1				
Talking points	1				
Speaker outlines	1		0.5		\$ XXX
BLOGGER OUTREACH					
Organize blogger teleconference (same as press teleconference)					
Develop blogger list				10	
Blogger pitching (adapt pitch letter to MSM journos)	21.5				\$ XXX
MEDIA REPORT				10	
					\$ XXXX

CREATE A TIMELINE

A timeline is your tactical game plan. A good way to manage a timeline is to chart out each of the tasks you've identified, along with other factors that will influence your work—such as a time-consuming event, Congress's schedule, a holiday or the campaigns of other groups in the community.

One of the easiest ways to do this is to work backwards from the final tactic implementation date (see page 50).

EVALUATION:

11. How did you do?

Many organizations tend to skip this leg of the process, but an honest evaluation will reveal strengths and weaknesses in your communications strategy, so it's important for planning future campaigns. You should evaluate midway through your campaign, so you can adjust course as needed, and at the end, so you can capture lessons learned. If you are running a multi-year campaign, consider an annual evaluation. Build this into your overall project budget.

Here are some questions to ask as you evaluate:

- Are you reaching decision makers on your issue and swaying them to your side?
- Are your target audiences responding to your message?
- If not, does your message need to be changed, or do you need to reevaluate whether you've identified the right target audiences for this campaign?
- How has the behavior or culture of your audience changed?
- What milestones have been met in the course of your campaign?

How much money did you spend, and what were the results? How could you save money in the future?

A few tactics for getting the information you need for evaluation:

- Stakeholder interviews
- Media audit and analysis
- Public opinion research
- Data on public behavior
- Online social media analysis tools (paid or free)

Glossary of Tactics

Following is a glossary of different tactics that you may want to consider when carrying out your communications campaign. Under “when to use” we’ve listed sample scenarios and resource needs for the specified tactics. These situations and requirements are not exhaustive.

These are some of the tactics you can use to get to the right people, whether it’s recreational boaters, your governor or the board of a Fortune 500 company.

B-ROLL B-roll is a high quality pre-recorded video. It features short segments illustrating an issue that is difficult to capture. Typically, TV reporters appreciate b-roll when it contains footage that they could not obtain themselves.

When to use:

- To accompany a press release or news announcement aimed at TV
- To record a significant, visually-oriented and newsworthy event

BLOGGER OUTREACH There are numerous influential, high-traffic blogs whose followers may fit within the audience demographic you want to target. Reaching out to bloggers by email, phone, Twitter or blog comments can prompt them to cover your issue(s), thus spreading awareness for your campaign to new audiences. Bloggers often appreciate receiving a “blogger kit,” with shortened links, photos, videos, a concise summary and Twitter conversation hashtags.

When to use:

- If the blog’s readers fits the audience you want to target
- If the blog is particularly influential with your decision makers—for example, legislators, community leaders, consumers or corporations
- If coverage of your issue in a controversial, opinionated way benefits your strategic goals
- If your issue is/will be covered within the blogosphere in addition to (or instead of) traditional media outlets

CALENDAR ANNOUNCEMENT A calendar announcement alerts calendar editors at mainstream media outlets of a specific upcoming public event.

When to use:

- In advance of an event that you or a partner is hosting, where increased public attendance is desired
- If the event itself is not very newsworthy, but you would like to boost public awareness

DIRECT MAIL Direct mail can be addressed and sent to individual recipients—such as your members or potential supporters. It can take the form of memos, letters, postcards or invitations. Response rates are generally low, often less than one percent.

When to use:

- *If you have the budget to commit to writing, designing, printing, sending and tracking the results of your finished product*
- *When you are addressing a very specific target audience, such as people who have made contributions to your organization in the past*
- *When you want to target audiences that may be unreachable through other media (for example, online or English-language media)*

EDITORIAL BOARD OUTREACH Newspaper editorials often carry a lot of weight with government officials and other community leaders. Reach out to editors of newspapers to advocate a particular viewpoint on legislative policy, or other topics affecting a certain community, through an editorial. Seek out an in-

person meeting, a phone conversation or present information over email to help move the editors to publish an editorial on your issue.

When to use:

- *When you have important insight on a news issue that is currently being covered by that paper.*
- *Ahead of a major vote or decision (use your editorial board asks judiciously!)*
- *When new information is released that is particularly timely or adds a new dimension to a controversy or policy decision.*
- *When you have one or two respected community leaders or other experts who can represent your position well to editors at a paper.*

EXPERTS LIST A good experts list contains all of the contact information a reporter would need to set up interviews with the diverse assemblage of people backing you on your issue. Third party experts who agree to be included on this list are valuable because they allow reporters to create a story that appears balanced and objective.

When to use:

- To showcase credible, diverse support for your issue or story
- To accompany report releases, so that reporters can contact outside experts who have reviewed your report and agree with its findings
- As a stand alone document in your press kit

FACEBOOK Facebook is a free social networking site in which users can create personal profiles, post photos and links to favorite web pages, communicate with friends, and become “fans” or supporters of specific companies, organizations, products, campaigns, etc.

When people add friends to Facebook, they can easily connect with them by sending personal messages, posting updates that are viewed via a “News Feed,” inviting them to events, asking them to become fans of a page or members of a group, or asking them to support a cause. The budget allocated to Facebook may vary widely, depending on whether or not you’re interested in building partner applications, placing ads, researching your audiences’ demographics, etc.

When to use:

- To communicate with your base and cultivate new supporters
- If your own web site is not very well-known
- If your topic is already being discussed on Facebook (e.g. via status updates or within dedicated fan pages or groups)
- If you have plenty of useful, multi-media content to share
- When you have the content and resources available to interact with your target audience on Facebook regularly

FACT SHEET A fact sheet lists information that clearly supports your message and can be used by reporters who do not have time to research your issue. Effective fact sheets use short, bulleted lists of specific, sourced facts.

When to use:

- To provide further context and details about a complex issue
- To accompany report releases
- During long, drawn-out campaigns
- As defensive communications

FLICKR Flickr is an online image and video hosting site and a social network. It encourages casual browsing by sorting pictures not only by relevant search terms, but also by their level of “interestingness.” Browsers can comment on photos they like and join special interest groups, sparking communication among communities of friends, family and strangers.

When to use:

- *If your cause could be easily understood and shared through one or more images*
- *If your cause could be drawn or photographed in a provocative way to inspire community members to take action*
- *If your audiences are using other social media networks – like Facebook, Twitter or blogs – that easily integrate with Flickr*
- *If your audiences already use Flickr and there are Flickr special interest groups devoted to your campaign topic, or if one could easily be created that would interest members*

GRASSTOPS OUTREACH Grasstops outreach attempts to effect change through strategic,

targeted engagement with influential individuals, such as political, business and civic leaders. This type of outreach may require less effort and fewer resources than grassroots outreach, but is dependent on building strong, trusting relationships and tailoring issues to meet the needs of individuals.

When to use:

- *When communications channels with these individuals are open and beneficial to your strategic goal*
- *When specific individuals have been identified and their influence is certain*
- *If dealing with controversial issues in which an open debate is not desired*
- *When you have allied, credible messengers who are willing to show their support*

GRASSROOTS OUTREACH Grassroots outreach is defined by the mobilization of a community with a specific passion or interest, in an effort to persuade decision makers, spread the word, increase volunteerism, raise money, etc.

When to use:

- *When increased public participation directly benefits your goal or objectives, as with a voter registration drive, petition, fundraising event, etc.*
- *If you have the staff and capacity to handle an influx of interested, impassioned volunteers or members*
- *When you want to show key decision makers the strength, size and determination of your organization and members*
- *When you have a message that resonates with a lay audience (i.e. not too wonky – emotional appeals are particularly effective)*
- *If your campaign has adequate time to build momentum, or has a large, highly active list to draw from already*
- *When you have a specific “ask” or call to action for your recruited members*

ISSUE BRIEFINGS Briefings are not generally used to solicit immediate coverage, but rather to credential an organization as a resource on certain topics, and to give reporters, legislators, or others important information that will help them cover stories on the chosen subject in the future.

Specific types of briefings – such as reporter breakfasts with an elected, or a nationally-renowned expert or report author – are designed to give reporters close, intimate access to people who may be difficult to reach otherwise.

When to use:

- *To develop ongoing relationships with the media*
- *To educate the media on complex, important, or possibly controversial issues*
- *When you have a spokesperson or expert that the media is interested in interviewing*

LETTERS TO THE EDITOR Letters to the editor and online comments in response to published coverage run in a publication’s letters section and on their web site. Depending on the publication and volume of letters received, letters may be chosen based on the clarity of their argument and whether the writer lives in a particular media market. Asking members to write letters to the editor is a great way to engage in grassroots organizing among your membership or volunteers, but be sure people write in their own words. Anything that appears to be part of a

form letter drive or orchestrated campaign will be rejected by many outlets.

When to use:

- *To correct or interpret facts in response to an inaccurate or biased article that recently appeared*
- *To explain the connection between a news item and your organization's priority issues*
- *To praise or criticize a recent article or editorial*
- *To encourage a newspaper's fair and unbiased coverage of your issue*

MEDIA ADVISORY A media advisory is a brief summary that notifies the media ahead of time about an event so that they can plan to cover it. It tells reporters the basics without revealing too much information.

When to use:

- *For event-oriented news, such as a press conference or demonstration*
- *When targeting reporters who are looking for a visual opportunity*

MEDIA TOURS Media tours are informal group or one-on-one meetings with reporters, led by someone affiliated with your organization. A media tour can be a "traveling roadshow" in which an expert goes from media outlet to media outlet. Alternatively it can be a field trip, aimed at giving a reporter an up-close look at the issue that you are trying to get into the media. Reporters may be more likely to write an in-depth story on your issue if they have the chance to get out into the field and witness it firsthand. A media tour is also an opportunity for you to offer a reporter background material, story ideas, perspectives and other information on your issue, for both short- and long-term reporting.

When to use:

- *If you have a knowledgeable, local guide who understands your goals and message*
- *If you have a visually compelling setting to share*

NEWSLETTER Newsletters are organization-branded communications that are sent to members and allies on a periodic basis, either through mail or email. They can give updates on

your organization's activities, spotlight supporters or serve as a call to action.

When to use:

- *When you want your communications with your audience to be in a more discreet, closed venue (while knowing that opponents do subscribe to these occasionally, as do reporters)*
- *If you have the staff time and resources needed to produce a regular publication*
- *If you want to reach communities who are difficult to reach through mainstream or online media, e.g. rural or non-English-speaking audiences*
- *If your supporters expect to hear from you and value the information you share—it directly affects them and they depend upon it*
- *When you want to build up your "brand," for example, after a name change, a change of leadership or when in competition with another organization*

NEWSWIRES (PR NEWSWIRE) Newswires are used to send releases to a wide number of reporters. The service is available to subscribers on a pay-per-use structure. Text releases are distributed

through newslines – collections of journalist groups that have been chosen to represent coverage in a particular geographic area, industry or interest field.

When to use:

- *If you have the budget to pay for the release (one release can cost over \$600)*
- *If your own media list is small, and you want your release to reach large numbers of reporters, editors and producers*
- *If you want your release to occupy a space online and be searchable through search engines, such as Google News*
- *When you want to target corporations and businesses specifically (newswire prints of releases have wide pickup in business journals).*

ONLINE COMMENTS "Letters to the editor" can be published instantly on a news website's comments section. As a result, readers can debate an issue as soon as it emerges. Asking members to weigh in on an article's comments section can be a way to ensure that your side gets adequate play. A lively comment section also

sends the message to an editor that this is a topic that the community cares about, and one that is worth further coverage. Be careful, though – online comments can create a “he said/she said” dynamic which is not helpful if you’re trying to bury a conflict.

When to use:

- *To correct or interpret facts in response to an inaccurate or biased article or published online comment that recently appeared*
- *To explain the connection between a news item and your organization’s priority issues*
- *To praise or criticize a recent article or editorial*
- *To encourage a newspaper’s fair and unbiased coverage of your issue*
- *To show that a large number of people agree with you on a certain issue*

OP-EDS Op-eds are guest commentary articles that appear on the editorial pages of a newspaper. They are written by local citizens, experts and leaders of organizations—people like you. They are a powerful, cost-effective way for you to educate a large number of people – especially

opinion leaders – about your issue, control the frame of the story and influence policymakers.

When to use:

- *If you have a strong opinion and well-articulated argument that has not yet been voiced by others in the newspaper*
- *When you can tie the piece to a timely news story; for example, a controversial vote, an anniversary, or a recent event in the community*
- *When you have a signer local to the community that the newspaper serves*
- *To bring control and accuracy to the coverage of your issue*
- *If your issue impacts the community in some way (be sure to demonstrate that impact in the piece)*

ORGANIZATIONAL BLOG A blog is a dynamic web site, maintained by an individual, group, organization or company. It is updated with regular, conversational, journal-like entries, known as “posts.” Blog posts may contain text content, images, hyperlinks, attached documents, embedded videos, widgets, surveys/polls, etc.

When to use:

- *When you want to boost traffic to your web site and increase its search engine optimization ratings (since blogs are updated regularly, sites with blogs rise to the top of search engines)*
- *If you have the staff time and resources to post regularly*
- *When you have an opinion, and don't have too many restrictions in sharing it*
- *When you want to spotlight the expertise of someone in your organization, and make them a source for the media, the public and other bloggers*

PAID ADS (PRINT, TV, ONLINE, OUTDOOR)

Advertisements are very useful for promoting long-term, issue-oriented campaigns or for short-term cause awareness. They can also help membership-based organizations attract new members.

When to use:

- *If you have the budget to commit to designing and placing ads*
- *If you have a simple, catchy message and a*

compelling visual to accompany your ad

- *When you want to gain shallow understanding and support among the masses as a starting point*
- *If you have a specific strategy to target people predisposed and persuadable to your message*
- *When you have a specific ask of your audience*

PITCH LETTER A pitch letter introduces an organization and an idea for future coverage. It is written for an individual reporter and personalized to his or her interest. A pitch letter gives the reporter a story angle and enough time and leads to discover the facts, as opposed to a press release that is limited to a 24-hour or less window.

When to use:

- *If you want to bring media attention to a larger, ongoing issue or trend*
- *If you have a specific media target in mind*
- *To pitch less time-sensitive feature and investigative stories*
- *To specifically target and build interest among high priority reporters ahead of a planned breaking news release*

- *When trying to get magazines to cover your issue or story*

PUBLIC OPINION RESEARCH Public opinion research is often conducted and used at the beginning of campaigns to gauge the opinion of voters and the public on specific issues. Questions for focus groups, polls and surveys are designed by public opinion researchers in partnership with your organization. Results are analyzed to inform the crafting of messages and recruitment of messengers, as well as to determine the viability of a campaign or issue. Keep in mind that public opinion research can quickly become outdated, depending on shifting political and cultural events.

When to use:

- *To test which of your messages and your opponents' messages are most persuasive among your target audience*
- *To find out who is most credible to speak about your issue (for example, farmers vs. scientists vs. fishermen vs. environmental advocates)*
- *If you have the budget to hire a public opinion research firm and the time to put the research*

"into the field," allowing enough time for data analysis

- *To examine specific demographics (according to race, gender, age, education, geography, etc.) and their stance on your issue*

PUBLIC SERVICE ANNOUNCEMENT (PSA)

A public service announcement (PSA) is an advertisement broadcast on radio or television for the public interest. PSAs raise awareness about specific issues, commonly health and safety topics. Most of the time, nonprofits provide the programming content, while the participating advertising agency and media companies provide creative services, media planning, and dissemination services on a pro bono basis, and help with placement on radio or TV stations.

When to use:

- *If you are seeking to modify public behavior or attitudes through awareness and education*
- *If your issue is non-ideological and apolitical*
- *In conjunction with the launch of a larger communications campaign*
- *When announcing an event to boost attendance*

PRESS CONFERENCE Press conferences bring together members of the media, representatives from your organization and experts for a news announcement and a question and answer session.

When to use:

- *If you can provide a visual opportunity to the media (this is especially good for TV)*
- *When you have breaking, hard news to report*
- *When a high-profile spokesperson or expert is involved*

PRESS RELEASE Press releases are good disciplinary tools because they encourage you to create the news story that you ultimately want to see in the media. Like a news article, a press release is a summary of the news and facts about an issue, intended for the media. They are written in the inverted pyramid style, with the most important information in the lead paragraph. Subsequent paragraphs expand on that information with more detail in decreasing order of importance, with the last paragraph noting the least important information.

When to use:

- *If you have breaking news to report.*
- *When your content is factual and can be checked by a reporter*
- *If you have someone who can be quoted as an authority on the subject*

PRESS TELECONFERENCE A press teleconference is a gathering of members of the media, representatives of your organization and experts for a news announcement and question and answer session via telephone conference call. An accompanying web presentation can be used if visuals are necessary.

When to use:

- *For breaking news events in which either the target reporters or the event speakers are not locally available*
- *When pitching multi-state, national or international media markets*

SOCIAL MEDIA RELEASE A social media release is an interactive press release that uses multi-media features and capabilities to attract bloggers and

social networkers. Information is delivered in a concise and straightforward way, and offers features such as trackable, shortened URLs, Twitter keywords (known as “hashtags”), and code for your website that allows users to embed online video, photos, badges, widgets and more.

When to use:

- When bloggers and/or social networkers comprise a significant portion of your target audience
- If you have numerous online resources related to a campaign

TOPIC-BASED COMMUNITIES AND LISTSERVS

Topic-based social networks strive to connect people who are passionate about a particular subject and funnel their energy into a relatively closed space, to make for efficient and trustworthy sharing of information and ideas. Often Yahoo! and Google groups are more regional in focus.

When to use:

- When targeting “the choir” – i.e. your base. Participants in these communities tend to be

much more than casually acquainted with specific issues.

- When targeting a specific geographic region; for example, neighborhood parent groups
- If you are willing to have the community drive the conversation—conversation threads are much more open here than on Facebook

TOWN HALL MEETINGS Town hall meetings are designed to give community members direct access to influential members of the community, such as elected officials, candidates or community leaders. They typically take the form of a presentation, followed by an open forum of question and answer or roundtable discussion.

When to use:

- When you want to inform a specific, targeted audience that is active and engaged on your issue
- In response to controversy or mistrust among audience members and constituents (in other words, to “set the record straight”)
- In crisis management situations, to repair your organization’s reputation
- To portray a decision-making process as open, fair

and democratic

- *If you have spokespeople who understand the value of strategic messaging*

TWITTER Twitter is a free micro-blogging service that answers the question, "What am I doing?" Twitter enables its users to send and read other users' 140 character updates, known as "tweets." Tweets are displayed on the user's profile page or in public or private sub-category lists the user sets up. Twitterers can restrict delivery to those in their circle of friends or, by default, allow anybody to access them. Users can send and receive tweets via the Twitter web site, by cell phone via Short Message Service (SMS) or through partner applications/add-ins.

When to use:

- *If you have the time to dedicate to researching, following, tweeting and searching (about five hours per week)*
- *When you have an event where public debate and opinion is lively, and want to draw attention to it*
- *When you are targeting more educated, urban, tech-savvy audiences*

- *To update members, reporters and other interested parties on breaking news in real time*
- *To find out what specific reporters are working on and to help you in your outreach to them*
- *To track what your opponents are up to*

VIRAL VIDEO A video can often convey a message in a more memorable, straightforward and humorous way than any written appeal. As video entertainment through the web has become more and more widespread, the sharing of videos through Facebook, Twitter, email, blogs, YouTube and Vimeo has become a boon for amateur videographers.

When to use:

- *When the video you've created is easy to view online, and can grab the viewer's attention within the first 30 seconds*
- *When the content is funny, quirky, shocking and/or inspiring enough that people will share it*
- *If the video or channel gives people a place to go next, like your web site, so entertainment turns into education and, ideally, action*

A note on YouTube:

This popular online video hosting site has boosted its interactivity with an easy interface for people to upload their own movies, a comment feature to discuss videos, and profiles and “channels” people can use to find the content that particular individuals and organizations are producing. YouTube also provides HTML code for videos so you can embed them in blogs, customized Facebook pages/profiles and emails. You can also instantly see statistics of how often your video has been viewed, where it’s been embedded (and how many views resulted) and where in the world it’s being watched.

WIKIPEDIA As the first user-friendly, publicly-edited online encyclopedia, Wikipedia.org gives the public the power to create and edit information on a variety of different topics. Because Google searches prioritize web sites that are edited most often and have the most links, Wikipedia is often the top site that pops up when conducting a standard Google search.

When to use:

- *If you are trying to disseminate information on a*

new or arcane issue that doesn't have a good web presence

- *If you are dealing with a controversial issue (remember to remain neutral and accurate in your writing)*
- *When targeting newcomers to your campaign's issue, including reporters*
- *To provide links to your own home page, as well as recent reports or useful news stories*

WRITTEN STATEMENTS Written statements are issued in immediate response to breaking news events or announcements, when you want to make sure reporters hear and include your side of the story. A statement should include a brief synopsis of the news you are commenting on, your spin on the issue, and quotes from prominent spokespeople. Statements can also be issued if your organization would not like to be interviewed, but would like to release a carefully messaged statement.

When to use:

- *When a story is already “moving” in the media, and you want to ensure your spokespeople are quoted in coverage, or have “gone on the record”*

WORKSHEET:

Goal

PIT-STOP

PIT-STOP

PIT-STOP

PIT-STOP

GOAL!

WORKSHEET:

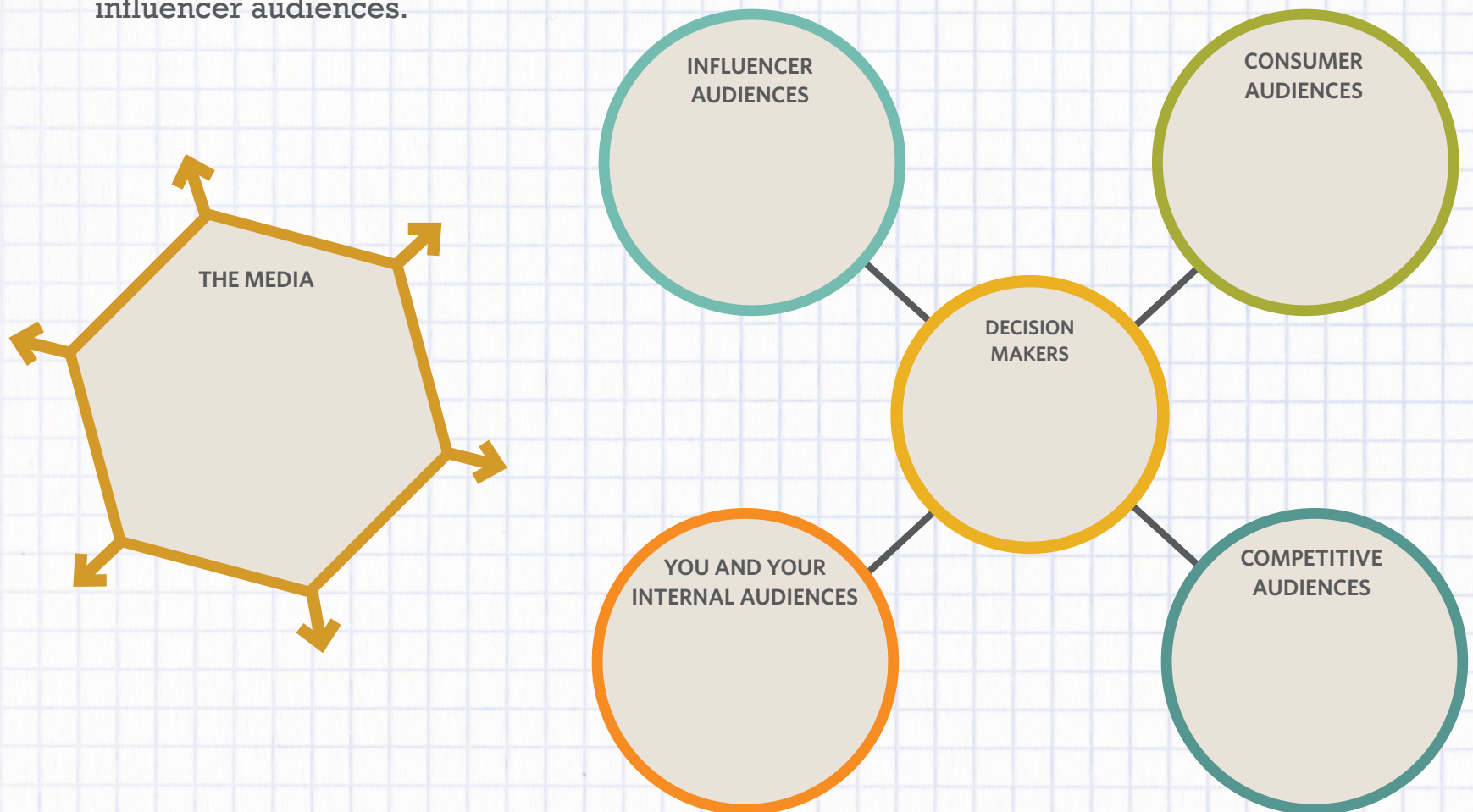
Research

Make a list of the social, political and economic factors that make up the environment where your issue will take stage. Don't forget your strengths, weaknesses, opportunities and threats. Or, have fun and draw a picture.

WORKSHEET:

Audiences

Audiences interact with each other in many different ways. Jot down the audiences that you are working with. The media can influence all of these audiences, but your media efforts should be focused on influencing your decision makers and influencer audiences.



WORKSHEET:

Values

Fill in the values that you think matter to the specific audiences you're targeting.

AUDIENCE	VALUES

WORKSHEET:

Messages

Values + Threat + Solution = Message. Now put them together for your message!

VALUES

+

THREAT

+

SOLUTION

=

MESSAGE

WORKSHEET:

Messengers

Brainstorm your list of messengers:

How will they reach:

DECISION
MAKERS

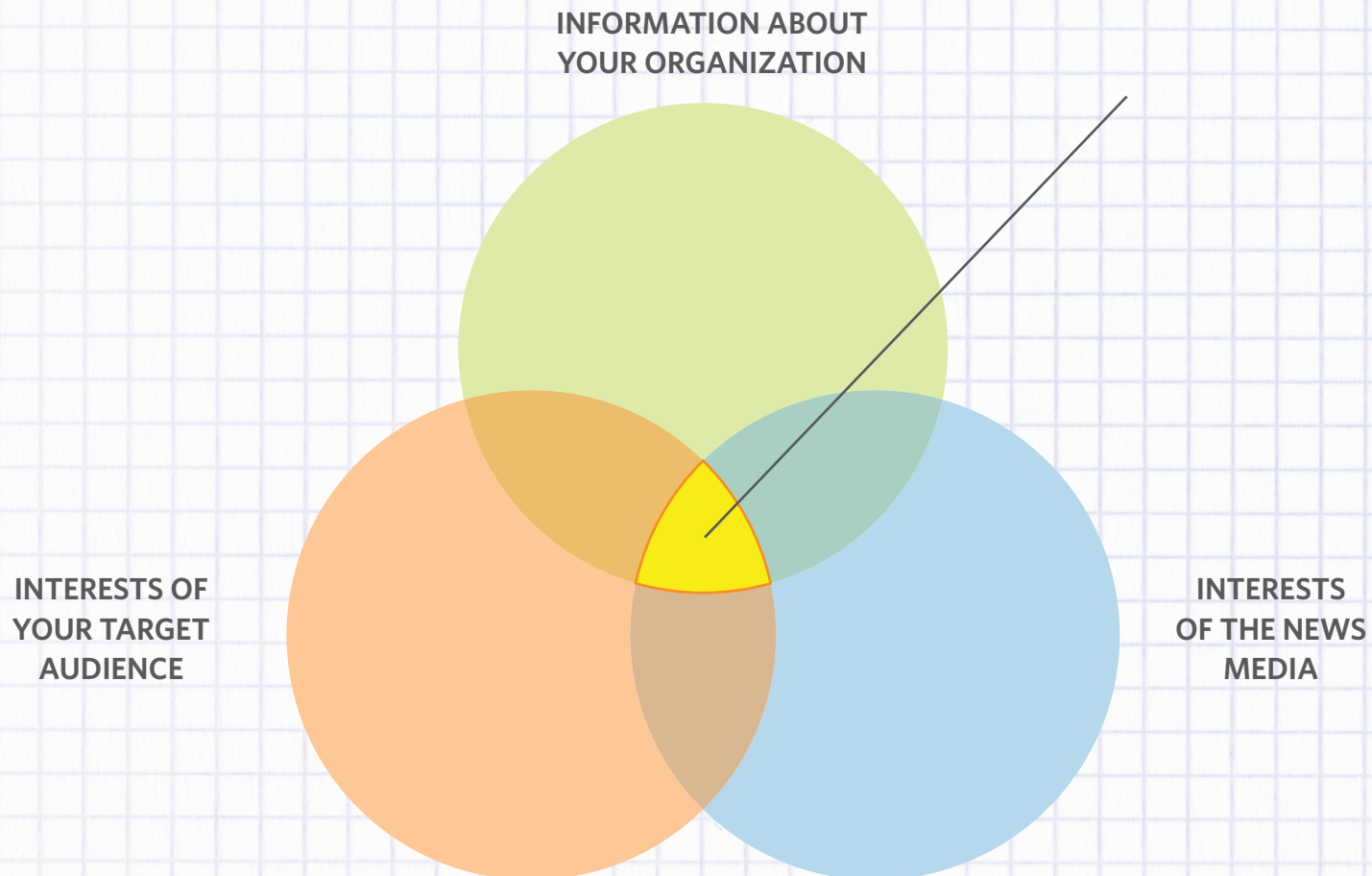
INFLUENCER
AUDIENCES

THE MEDIA

WORKSHEET:

Targets

You don't want to alert the press about everything going on in your organization. The "golden triangle" highlighted below represents information about your organization that is interesting to both the news media and your target audiences.



WORKSHEET:

Tactics

List out which tactics you would like to pursue. Check with the “When to use” scenarios in the Glossary of Tactics.

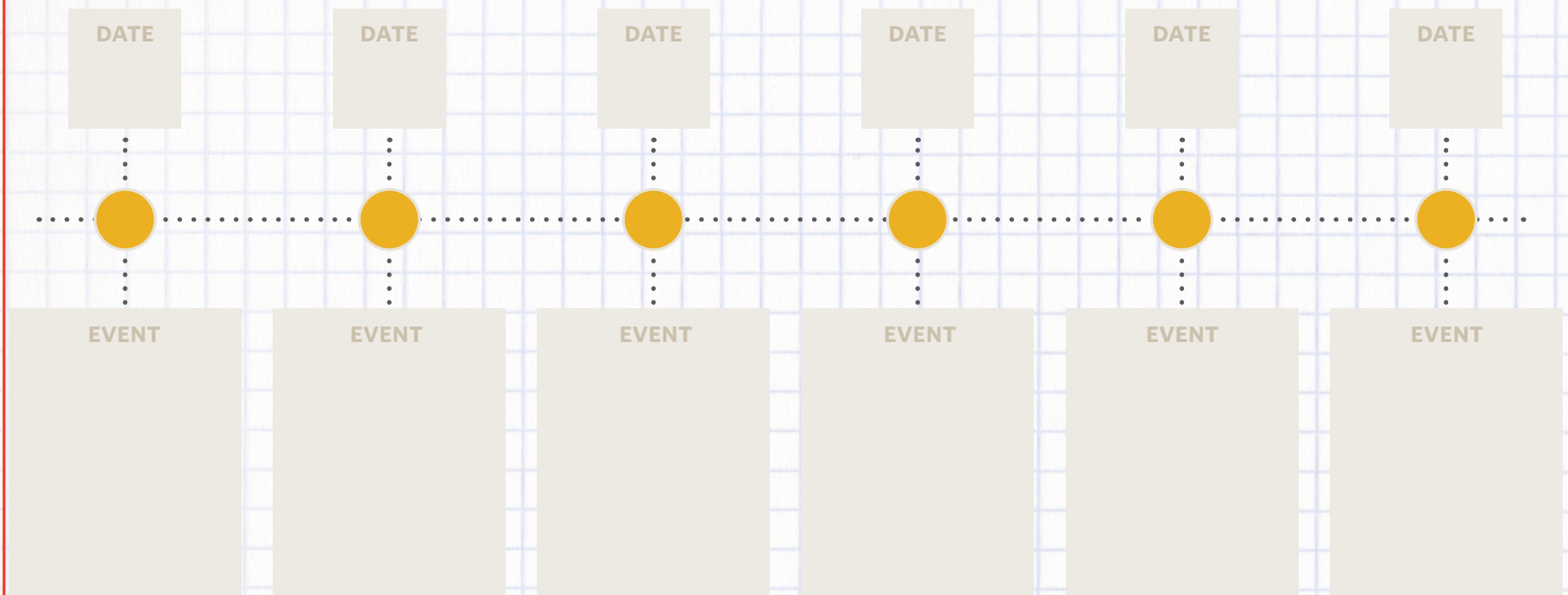
For example: News conferences, Letters to the editor, Editorial board meetings, Media tours, Teleconferences, Radio interviews, Radio actualities, B-Roll for television story, Blogger outreach, Tweeting (Twitter), Facebook Fan page

WORKSHEET:

Budgeting

ACTIVITY 1	STAFF 1	STAFF 2	STAFF 3	STAFF 4	TOTAL \$
TASKS	HOURS SPENT				
					\$
ACTIVITY 2					
TASKS	HOURS SPENT				
					\$
ACTIVITY 3					
TASKS	HOURS SPENT				
TOTAL					\$

WORKSHEET: Timeline



WORKSHEET:

Evaluation

Give yourself a grade on these important indicators of success.
Select check, check plus or check minus.



Are you reaching decision makers on your issue and swaying them to your side?



Are your target audiences responding to your message?



Has the behavior or culture of your audience changed in the way you want?



Have milestones been met in the course of your campaign?



Did you do a good job in keeping your budget on track?



resource | media



*making the
environment matter*

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