



# Communications Planning

## TREC Webinar Worksheet

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Communications is one of the most powerful leadership, organizing, “influencing” and fundraising tools nonprofits have to work with. Do you have a plan in place for your hot campaign, long-term policy shift goal, or for your organization as a whole? Use this worksheet to take a step back and think about what you want to achieve, who you want to reach and what you want them to do on one particular campaign or other effort before generating your list of communications tactics. Going through this exercise will result in more effective and efficient communications outreach that leverages your valuable resources and staff capacity.

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## **GOAL**

At the “end of the day” what needs to happen or change? What’s your goal? The clearer the goal, the better the strategy and execution. Examples can include passing a piece of legislation, stopping a project, etc. Is your goal S-M-A-R-T, or Specific, Measurable, Achievable, Realistic, and Timebound? In the simplest of terms, how will you know when you have won?

List your clearly defined goal:

## **DECISION MAKERS + AUDIENCES**

Who is/who are the decision makers who can help you achieve your goal? Can you reach them directly, or do you have to activate others who can reach them, if not you? Who has influence with your decision maker? Imagine, for example, that you are trying to influence a resource extraction company. If you are an environmental group, you may not have direct access to the C-suite. Look at who they sell to? Can you reach those retailers through customers in your area? List the decision maker/s and your audiences who you need reach and activate.

## **SPOKESPEOPLE**

Who are the most trusted voices to speak to your audiences? Can they credibly deliver your message? List them here:

## **LANDSCAPE ASSESSMENT**

Next, you want to understand what is the dominant narrative that currently exists in relation to your campaign or your organization's priority issue. What is the starting baseline on how people are talking about this topic on social media, how reporters are covering it, how it polls with voters, or other ways to assess the landscape in which you aim to affect change? What are your opponents saying? What challenges will you face? What opportunities are before you? Write here how your audience views your goal or the larger issue you are addressing.

## MESSAGE

If there is one single idea that you want people to come away with when they hear your spokesperson on TV, or they read your e-newsletter, or hear one of your leaders testify before the state legislature, what is it? What is the message that will be most persuasive and motivating for your audience/s? What do they care about and how will they be affected? Key to your success will be having an understanding of your audience and the values they share. These can be based on their personal experiences, history, sense of place, community attitudes, needs and belief systems. What will compel them to act; e.g., family, faith, prosperity, health, freedom, integrity, fairness, sanctity of nature, stewardship, etc.

Come up with a:

- Values statement: What values are at stake? What does your audience care about?
- Threat or problem statement: What is at stake? What is threatened? What problem are you trying to solve?
- Solution statement: What's your unique idea on how to fix that problem?
- What is the role of your audience? What is your call to action?

What visuals will reinforce your verbal message? What image should come to people's minds when they hear about this? What images will spark the emotions you want to stoke in your audience (awe about a natural area, anger about a polluter, etc.). Put that image or set of images front and center in your communications materials. List (or draw!) your ideas here.

## CORE POSITIONING

Based on the messaging work you've done, how will you position your campaign overall? Can you distill your issue down to one sentence? At its core essence, what is this about? Try to get to something that's a shared value, aspiration, identity that evokes some *emotion*. Something that makes the broadest possible swath of your audience nod in agreement and *feel* something because it's really important.

## COMMUNICATIONS STRATEGIES AND TACTICS

Map your communications strategies and tactics to the goals you want to achieve, the audiences you want to reach, and the internal capacity your team is willing to commit to the effort. Strategies can include grassroots organizing or lobbying. Under each overarching strategy, list specific communications tactics that can help you execute winning strategies.

These might include:

- A campaign website
- Media, media, media (story pitching, staged media events, editorials, op-eds, etc.)
- Grassroots organizing and events
- Social media
- Large-scale branding or issue awareness content campaigns; e.g. video, social engagement campaign, paid advertising, media events, etc.
- Donor outreach
- Public affairs/meetings with elected officials
- E-newsletters, blog posts, or guest posts on other blogs

List your top priority tactics that can get your message in front of your target audiences:

## **CALENDAR OF ACTIVITIES**

Fill in the more specific details on your ideas for activities and materials to address the tactical priorities identified above. Make a list of existing calendar hooks or hard news hooks, and other events. Some people find it easier to work backwards from a set end date listing, for example, when you ideally would like a favorable editorial to appear in your leading newspaper, or when a wave of paid ads should run, etc.

**October**

**November**

**December**

**January**

**February**

**March**

**April**

**May**

**June**

July

August

September

## **MEASURING PROGRESS**

How you measure your communications efforts should be considered with your communications planning from the start. Ideally, you should build in measurable factors into each communications tactic you pursue. Examples of evaluation markers that will give you a sense for how you are progressing toward your goal should range from big (the targeted piece of legislation was signed into law) to small, covering all of your tactics (positive editorial ran in The XYZ Times, or we placed three op-eds by influential leaders in X Congressional District during the timeframe of our campaign). List possible ways you will measure and evaluate the success of your communications plan.