*July 2017*

# Communications Planning

**JRO**
JOHN R. OISHEI FOUNDATION

**Health Foundation**
for Western & Central New York
*Investing in Better Health for People and Communities*

## COMMUNICATIONS PLANNING

For any organization to be effective, it must communicate with its key audiences to build support, share information about available programs, products and services, communicate its mission, and attract partners and sponsors. Building a communications plan can help your organization be more strategic in identifying key audiences, using consistent and effective messaging, choosing the right communication tools and being able to quickly and effectively share information to engage stakeholders.

While most organizations communicate in some form or fashion, those that strategically consider the following are better equipped to effectively engage the audiences they need to reach:

1. **What is the organization's main communications objective(s)?** To raise funds? Engage more participants? Sell a product? Encourage sponsorships?

2. **Who are you trying to reach?** Are the messages the same to all audiences or do they vary? Are some audiences more important to your organization than others?

3. **Where can these audiences be reached?** What are the most effective communications tools to reach them? Do different audiences require different methods of reaching them?

4. **What action are you trying to encourage?** What is the desired outcome of the communication? Is your communication clearly articulating this?

5. **Does your messaging line up with your objectives?** Are you reinforcing your key messages and driving towards your communication objectives?

6. **Who is responsible for communicating within the organization?** Have you designated specific roles and responsibilities to your team? Are they aware of objectives and key messages in order to communicate effectively?

While it may seem difficult to find the time to dedicate to communications planning, it can be time well spent so that you and your colleagues are consistently communicating your desired messages to the right people, using the most effective tools.

## DEVELOPING A COMMUNICATIONS PLAN

The following are some recommendations on developing a communications plan for your organization. If possible, engage critical team members, including staff and select board members to assist in outlining the plan.

By developing a communications plan for your organization, you will be able to communicate more effectively and consistently with your most important audiences. Planning will also help you determine how best to reach your key stakeholders and to allocate your resources (time, staff, budget) effectively.

**1. Determine Your Communications Objectives:**

Take some time to ensure that you and your team have a clear idea of what you are trying to achieve through your communications efforts. Consider both the short-term objectives ("we'd like you to attend our fundraising gala") with the larger, more long-term objectives (we encourage you to learn more about us and become a donor).

Your communications objectives may differ depending on your audience and how they interact with your organization. For instance, there may be different messages to donors as

compared to messages designed for program participants. It is okay to have more than one communication objective, particularly for diverse audiences, however it is important to outline the primary objective and those that fit a more supporting role.

## 2. Target Key Stakeholders:

It is important to consider the varied audiences that your organization needs to communicate with and to consider which audiences are more critical in driving organizational mission. For many non-profit organizations, key stakeholders may include:

- Program participants or those who receive benefits from the organization

- Donors/sponsors

- Potential donors/sponsors

- Partner organizations

- Referrers

- Elected officials/community leaders

- Board members

- Staff

Specific circumstances may dictate which audiences take precedence over others for certain communications. However, you should understand who your primary audiences are in order to effectively plan and communicate with them regularly.

## 3. Develop Key Messages (Per Stakeholder Group)

Take some time to work with your team to develop your organization's primary messages that will serve as the foundation for your overall communications efforts.

Key messages are not taglines or slogans and they can be adapted depending on the communications vehicles and the audience. They are typically one to three concepts that help to define your organization and highlight what makes you unique. Your messages should

build on any established brand identity that the organization wants to reinforce.

It is important to note that these messages should take the audience's point of view into consideration. Ask if they will care about the information included, or are they looking for something different. In order to effectively engage critical audiences, be aware of the language and tone used and make sure it is understandable and relatable.

These messages can then be used in critical areas that define your organization – integrated into your website, social media descriptions, press releases, collateral materials and others.

Some considerations in developing key messages:

- Key messaging should answer the question, "Why does the organization exist?" By answering this question, you are better able to develop messages that communicate impact.

- Information including year established, location, or leadership is less important than communicating what need your organization addresses and how you make a difference.

- Include attributes that set you apart, make you unique or demonstrate impact compared to similar organizations or competitors.

- Include details that support your claims for added credibility.

- Key messages should be succinct, easily remembered and use simple language. Beware of jargon, industry terms or acronyms not commonly used by those outside your specific area.

## 4. Evaluate Current Communication Methods

Once you have developed your organization's key messages, it is time to evaluate your current communications vehicles to determine if they need to be updated in order to communicate your desired messages. This is typically referred to as a communications audit.

Materials you may want to audit for messaging include:

- Website: Where possible, update critical sections (Home page, About Us) to better reflect new messaging.

- Social media platforms (particularly the "About Us" sections, however review specific posts to determine whether or not they reinforce desired messaging.)

- Press releases: does your organizational description reflect these messages?

- Collateral materials – brochures, annual reports, program materials. While reprinting can be expensive, make sure changes can be made when it is time to update these materials. For pieces available as a downloadable pdf, an update may be well worth the time invested in revising the copy to integrate critical messaging.

### 5. Determine Critical Tools

In addition to reviewing current communications tools for messaging, your communications plan should include a determination of the most effective tools, or combination of tools to reach critical audiences. These may include:

- Website

- Social media platforms

- Brochures/annual reports/collateral

- Presentations (short/long)

- Media outreach

- Advertising

- Email/email newsletters

When choosing your communications vehicles, keep in mind the following:

- Make sure communications vehicles reach intended audiences effectively. If you serve an older, non-tech savvy audience, chances are they are not on Snapchat. If you serve the learning disabled, using video may be a great fit!

- There are a number of ways to evaluate current communications vehicles. Pay attention to available analytics to understand how effective your communications vehicles are. For instance:

  – Use your website analytics to understand which pages are most/least visited

  – Are those receiving your e-newsletters giving positive feedback or are they "unsubscribing"? How do your open and click-through rates compare to the industry standard?

  – Are followers to your social media sites growing and visitors engaged?

  – Use direct feedback from key stakeholders to understand better how they learn about your organization.

  – Do the demographics of your audiences "match-up" to the demographics of social media sites?

- Consider your resources in managing multiple communication vehicles:

  – Do you have available staff to continually update social media, blogs and newsletters and resources to customize content for diverse sites? If not, choosing fewer platforms and doing it well may be better than stretching too thin across multiple tools.

  – Are there other sources of content that you can share or reference to keep content fresh on digital platforms like e-newsletters and social media?

  – Consider your budget and choose communications vehicles that can be cost-effective.

- Create a timeline: Outline your overall communications plan with specific dates for each communication vehicle for a set time frame (monthly, quarterly, annually) to ensure you are communicating regularly and have the necessary communications
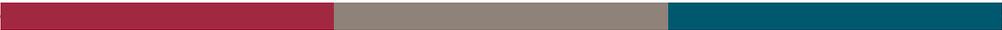
supports for busy times of the year or to promote specific events. By setting a calendar of communication you may also see gaps or communications overload that can be addressed through better scheduling.

**6. Determine Your Budget**

Assess the estimated dollar amounts for your outlined activities and track your progress. It is critical that costs and priorities be identified and included in your organization's overall operating budget.

**7. Review/Evaluate**

It is unlikely your communications plan will go exactly according to plan, as opportunities and challenges will arise. Your organization may also evolve, so continually reviewing and monitoring your communications efforts, messaging and tools are important to continue to drive your mission effectively.

Be sure to build in time for you and your team to review and sharpen your messaging; and evaluate your communications efforts; review materials to make needed updates and adjust your plan as necessary.