

# 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

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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,

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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

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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](http://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

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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](http://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



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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.

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### 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

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