COLLABORATIVE

Using Traditional, New and Social Media for Effective Communications Strategies

Launch Your Message

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As new technologies have changed the way we interact and share information, the definition of "media" has dramatically shifted over the past decade. As it has, what's also shifted is the way organizations need to think about using various forms of media effectively to receive information, share information and engage audiences.

Collaborative Communications Group thinks of media in three categories: traditional media, new media and social media. We believe that outreach plans must include a customized mix from each of these categories to effectively influence particular audiences. We define these media in the following ways:

Traditional Media

Traditional media flows one way to consumers, often through the journalistic process: a reporter looks into an issue or a press release is written about a research report and then released at a scheduled time, with the hope of creating a story for print, radio or television. This also involves using existing publications, white papers, issue briefs, case studies, articles and other such artifacts to create a base of resources on a topic area. Traditional media is a means of getting the word—and your message—out to a general or, in some cases, targeted audience.

New Media

New media is content creation—including podcasts, videos, text, websites and other multimedia that are presented without a media filter and help an organization share its message in new and dynamic ways. Flickr and YouTube are examples of distribution channels for new media. While blogs are often thought of as social media, they are in fact a form of new media where individual writers control the content they share with readers. It's still largely one-way communication, but it provides opportunities to begin dialogues, engage target audiences and build on a core communications foundation in a way that traditional media does not.

Social Media

Ten years ago, anything and everything that was found on the Web was referred to as "new media." Social media is the newest form of media and the least understood by many organizations. The key to social media, and what differentiates it from new media, is interactivity. Social media allows networks of users to create and share content with one another, through public social media, such as Facebook and Twitter, and internal social platforms, such as online communities for specific initiatives. While use of social media can indeed help to create a buzz among specific audiences, such as grantees, it also provides opportunities to scale and spread the dialogue around these core topics to those outside the organization's core internal audiences. Social media can be leveraged to its fullest by aligning messaging across online platforms and engaging new users themselves as storytellers and promoters of the organization. In addition to helping organizations drive and promote dialogue, social media can also play a key role as a "listening" tool, enabling better understanding of the existing conversations, framing and leaders on a specific topic. Of course, your reach on social media is limited to those who are already participating on a given platform.

It is the complementary use of these forms of media that create a strong organizational presence and a following by users. Building a framework to jointly leverage traditional, new and social media will create the greatest opportunities for message saturation and engagement by key stakeholders.

A Four Step Communications Strategy

This guide presents a simple, four-step process to developing an effective outreach plan. By answering a set of key questions, you'll be able to identify appropriate audiences, create consistent messaging and set up streamlined tactics to meet your outreach goals, whether you are considering a national public awareness campaign or a local fundraising event.

After going through the exercises in this section, you should be able to fill in the blanks in the following sentence, which will serve as a guiding principle for your outreach:

1 MAP — ## Who Do You Want to Reach?

2 PLAN — ## What Do You Want to Achieve?

3 MAKE — ## What Do You Want to Say?

4 SEND — ## How Will You Send Your Message?

GUIDING SENTENCE EXERCISE

THIS
....
name of initiative

WILL PERSUADE
....
target audience(s)

TO
....
action(s) you want target audience(s) to take as a result of your outreach

The guiding sentence exercise was inspired by Tom Ahern of Ahern Donor Communications' excellent "Love Thy Reader" workshop.

1
MAP

Who Do You Want to Reach?

Let's start by mapping the target audiences for your outreach.
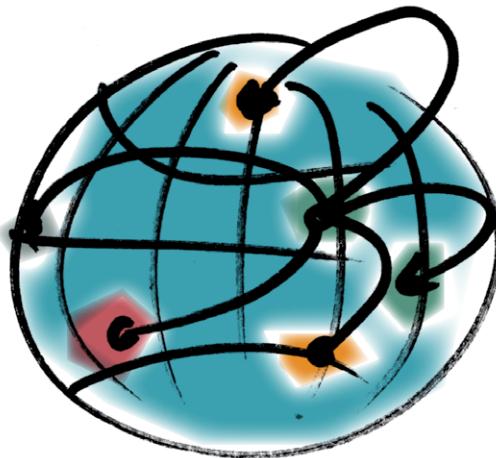
The Media is Not a Target Audience

Many organizational leaders, when asked who they would like to influence through their outreach, include "the media" as a high priority audience. While strong relationships with reporters and media outlets are critical, we value these ties for the connections they offer to those we'd like to influence. Put another way, media coverage, social media exposure or features on new media platforms are better thought of as vehicles for reaching the individuals and groups we want to speak to.

[There's an important caveat, here, as we think about individual bloggers and opinion writers. In some cases, these individuals are thought leaders in their own right and, depending on your goals, should be included as target audiences in your outreach plans.]

Stakeholder Mapping

If the media is not the end audience for your outreach, who is? You can use a simple tool to help guide your team's consideration of this question. Find a whiteboard or piece of poster paper and add your organization's name at the center. On the periphery of the page, write the names of groups with a vested interest in your work. Examples include those already closely connected to you—such as board members, donors or members—and those groups that should care about the outcomes of your work but may not have close ties, such as parents, teachers, state or federal policy makers and students.

Take a step back and begin to prioritize your target audiences from within the structure you've created. Perhaps it would be nice if parents were more supportive, but you're really looking to influence education leaders. Be as specific as possible and identify subgroups of stakeholders (district superintendents and state education commissioners, for example) that best describe your highest priority target audiences.

What Do You Want to Achieve?

2
PLAN
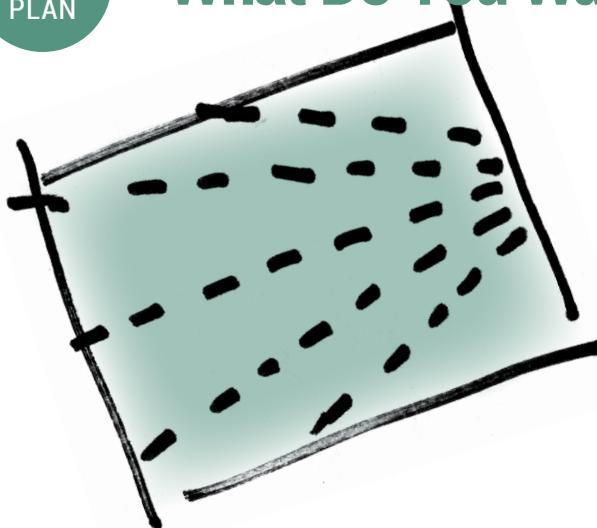
Before we can create the plane we need a solid blueprint to build from.

Let's consider the final "blank" in your sentence. As in any endeavor, you'll need to establish clear goals in your communications planning to ensure that the time and resources you invest in outreach are well spent.

Examples of clear communications goals include:

• Persuading voters to support a particular ballot initiative

• Demonstrating the importance of STEM education

• Drawing attention to the challenges faced by Hispanic students in accessing and succeeding in higher education

Using the specific target audiences you identified in Step 1, you can pinpoint the actions you want these audiences to take in support of your communications goals and fill in the final section of your sentence.

For example, if you seek to demonstrate the importance of STEM education, you may want superintendents to include STEM goals in their district's mission statements and elementary school parents to send a letter to their children's schools advocating for increased STEM material in the curricula.

GUIDING SENTENCE EXERCISE

THIS
....
name of initiative

WILL PERSUADE
....
target audience(s)

TO
....
action(s) you want target audience(s) to take as a result of your outreach

Is Social Media Worth Your Time?
Your Supporters Say Yes!

Increasingly, American adults are turning to sites like Facebook (more than 1 billion active users) and Twitter (230 million active users) not only to stay connected, but as a source of news and information.

When one of your supporters "follows" your organization on Facebook or Twitter, they see your updates in the context of news from family and friends. Some donors, clients or potential employees will check your website regularly, but many more will follow links that you share as part of a thoughtful social media plan. A strong social media presence has also become an informal performance indicator for nonprofit organizations, and savvy consumers expect to find you in these new online contexts.

Keep Your Supporters Engaged

Photos, videos and updates delivered via social media help to keep your supporters informed and excited about your work. What's more, they have the opportunity to interact with and share your content, further strengthening your relationship and helping to expand your visibility beyond your immediate network. For donors, this could translate to a greater willingness to give when you ask —online or offline— in your next campaign. For clients, this could mean an increase in registrations or sales when you announce a new program or initiative.

Join the Conversation

Even if your organization is not yet active on social media sites, chances are that the issues you are working on and perhaps even your organization's activities are being discussed by others in those contexts. Just as you would write an op-ed about a key issue or respond to a relevant news article with a letter to the editor, participating in social media gives you the opportunity to spark important conversations and to speak up where your expertise and activities align with a discussion. Sometimes, social media (especially in the case of Twitter) can offer you direct access to decision makers and thought leaders.

*Pew Internet & American Life Project, 2013

**Americans Using
Social Networking Sites**

ages 18-29	90%
ages 30-49	78%
younger boomers	65%
older boomers	46%

3
MAKE

What Do You Want to Say?

Building a concise and powerful message will help you engage your target audiences.

Defining Your Message

Now that you have identified your goals and target audiences, it's time to develop the messages that you'll send out through traditional, new and social media channels. Depending on the scale and complexity of your goals, you may need separate messaging platforms for each major target audience or for each key issue you seek to address.

Message Mapping

One way of tackling this challenge is message mapping. Message mapping is a scientifically based process originally developed in the public health sector for addressing risk and crisis communications. After decades of use, it is still seen as the most effective way to relay complex information to a wide range of stakeholders. Message mapping begins with a comprehensive intake process, talking with key internal and external audiences about effective and ineffective messaging, conducting an environmental scan of how the issue is currently being discussed in the public and undertaking a comprehensive communications audit to determine an organization's strengths and weaknesses while identifying the most effective research, data points and personal stories to advocate for the chose messages.

After this intake process, one can then develop the core statement and key messages that define an organization, while assembling those statements in a framework that can be used to guide all public discussions (media interviews, speeches, presentations) as well as printed and electronic collateral (publications, websites, emails).

The process is based on decades of research, including findings that the brain processes information in series of threes (maybe fives if we are particularly gifted, with little stressors and competition for our attention). By focusing on key concepts and data points, we take messaging from a laundry list of bullet points with no particular order and break it down into three key communications streams that align with the goals and work of the organization.

Message Map

An effective message map consists of several key components:

Core Statement – This is your defining message, better known as the first sentence of your "elevator speech." For a particular initiative or campaign, this sentence should provide a clear and compelling introduction and identify what you hope to achieve.

Key Messages – When you offer your Core Statement, the likely question is, "What does that mean?" The three Key Messages are designed to support the Core Statement. One (or all) of these three messages should be in all future communication vehicles related to your initiative. These are how you explain how your vision translates into real action.

Support Points – When one delivers a Key Message, there can be pushback for specific proof that the message is true. The three support points under each Key Message are designed to support the Message. Ideally, these Support Points are statistics, case studies or stories from the field and may evolve over the life of your campaign. These are only used when necessary to illustrate a point or support a statement.

Once developed, the Core Statement and Key Messages are intended to be evergreen, rooted in the organization's mission and work. If, after undergoing the comprehensive intake and research work necessary for a true message mapping process, you are finding a need to adjust the Core Statement or Key Messages, there most likely was a flaw in the process and it needs to be revisited. The Support Points, however, are intended to be updated and adjusted on a regular basis, whether it be a new research study or data point, a new initiative launch by your organization or a particularly compelling story you heard that relates directly to the message you seek to convey.

As originally intended, the Map is designed to be read from top-to-bottom, left-to-right. For these purposes, the left-to-right construction isn't as important, as we have constructed a triad of Key Messages that all feed the Core Statement. Supporting Points are ordered in place of importance, so a user of the Map knows that Support Point 1-1 is the first to deliver if pushed on Key Message 1.

While the final product of the process is the "Message Map," it is important to note that simply putting bullet points in boxes is not "message mapping." The key to the process is the intake, research and analysis that determines the most effective messages and supporting points to effectively drive your communications efforts. A better organization of messaging points is a noble goal, and should be pursued at every turn. But information gathering and inputs of the message mapping process are what makes it so successful, not simply the final product.

Message Map

CORE STATEMENT
Today's students need a strong foundation in STEM education to succeed in 21st century careers.

KEY MESSAGE 1
Schools need to devote more time and resources to rigorous STEM-based teaching and learning.

SUPPORT POINTS

1. Only 44 percent of 2013 U.S. high school graduates are ready for college-level math courses, and only 36 percent are ready for college-level science. (ACT, 2013)

2. U.S. students rank far below many foreign countries on international measures of math and science achievement.

3. Promising examples of project-based, real world and blended science and math instruction from around the country are demonstrating the potential to engage students and improve learning outcomes.

KEY MESSAGE 2
Corporations have a vested interest in helping students build strong STEM skills in primary and secondary school.

SUPPORT POINTS

1. "Only 16 percent of American high school seniors are proficient in mathematics and interested in a STEM career. Even among those who do go on to pursue a college major in the STEM fields, only about half choose to work in a related career." (U.S. Department of Education, 2010)

2. The decline in qualified STEM graduates is stifling American innovation. For the first time in our history, the majority of U.S. patents are being awarded to non-U.S. companies. (U.S. Patent Office, 2013)

3. Companies cannot find enough qualified STEM job candidates, even as the number of new STEM job opportunities continues to increase. (Bayer Facts of Science Education, 2013)

KEY MESSAGE 3
Federal policymakers should continue to support STEM education-related programs to help districts and schools improve instruction and student

SUPPORT POINTS

1. The President's FY 2014 budget proposes a 6.7 percent increase in STEM funding over 2012 levels. By adopting this change, Congress would support STEM professional development, STEM innovation networks and research on effective approaches to K-12 STEM education. (Society of Women Engineers, 2014)

2. Teachers, particularly in the early grades, need specialized, supplemental training in math and science to integrate STEM themes into all areas of instruction. This training requires investment at all levels, from pre-service programs to district-driven professional development.

3. Congress should reauthorize the 21st Century Community Learning Centers in support of hands-on, experiential learning; science, technology, engineering, and math (Afterschool Alliance, 2014)

4 SEND

How Will You Send Your Message?

You now know that traditional, new and social media outlets are not the targets of your outreach, they are the messengers. But how can you best use these channels to compel your target audiences to action?

Key advantages of the major communications vehicles:

Traditional Media
Speaking to your target audiences

Flows one way to the public, often through the journalistic process

Uses existing publications, white papers, issue briefs, case studies, articles and other such artifacts to create a base of resources on a topic area

Particular magazines, newspapers, radio or TV outlets may be selected to reach very specific regional or interest-area based audiences

Generally longest lead time of all communications channels

New Media
Engaging your target audiences

Primarily one-way communication, but can be more engaging and easily shared among online networks than traditional media content

Examples include blogs, websites and content sharing sites such as YouTube or Flickr

Ideally used to support outreach through other channels

Shorter lead time than traditional media

Social Media
Listening, speaking and engaging

Multi-directional communication channels – useful for sharing your message, engaging your audience and identifying key opportunities and improving your understanding by listening to others in the field

Includes public social media such as Facebook and Twitter as well as internal social platforms, such as private online communities

Can be used to instantaneously update and share information—in the form of brief messages—with followers

When used appropriately, can scale and spread messages to large audiences

The most effective communications campaigns use a mix of these mediums to:

Send messages – via a press release distributed to media outlets in a targeted geographic area announcing the launch of a new initiative

Spread messages – through a series of short video interviews with individuals who will benefit from the new initiative, featured on YouTube and shared via email and social media

Create dialogue – by encouraging key stakeholders to share their priorities via Facebook polls or live chats on Twitter

Putting it All Together

The next step is to bring together your target audiences, goals and messages into a plan with specific outreach activities and timelines. Use the worksheet on the following page—along with your completed message map—to guide your team's planning process.

DESCRIPTION OF INITIATIVE
(For example: report release, internship recruitment, funder outreach)

TIMELINE
(Provide a general range of time during which this initiative will take place)

TARGET AUDIENCE(S)
(Be as specific and limited as possible. Who do you want to influence?)

PARTNERS, ALLIES & MESSAGE MULTIPLIERS
(Specific individuals or organizations with a stake in this initiative that could lend support)

COMMUNICATIONS GOAL(S)

THIS   **WILL PERSUADE**

(name of initiative)   (target audience(s))

TO

(actions you want target audience to take as a result of your outreach)

METRICS

(How will you measure success?)

Date Sent	Activity Type	Target Audience	Metrics	Staff Lead
	Press Release, Facebook post, etc.	May be a subset of audiences for full initiative	May be specified for particular activity: number of retweets, etc.	Who will implement this activity?

Assembling Your Team: Key Roles and Responsibilities

Many small- to mid-sized nonprofit organizations face the challenge of balancing budget limitations with the need for systematic outreach efforts. By reviewing the key roles and responsibilities associated with an effective communications strategy, you can help to determine what need to be filled on your team — by assigning or reassigning work, by investing in professional development to build staff capacity, by hiring temporary or longer-term help from an external firm or by hiring new team members. Individuals may take on multiple roles, and some roles might be divided among two or more staff members.

Role	Responsibilities
Editorial Lead	• Leads all content discussions • Develops and manages ongoing communications calendar and particular campaigns • Establishes and continually refines core and supporting organizational messaging • Serves as the lead editorial voice in terms of aligning messages with content, verifying integrity of writing and adherence to content guidelines and standards • Develops ideas for new content pieces • Produces and manages e-blasts and e-newsletter content • Has a helicopter view of the organization's strategy, programs and goals as well as the day-to-day activities and sees the opportunities to promote/communicate this information.
Web and Social Media Project Manager	• Understands all aspects of the website and social media • Maintains detailed information on hosting, vendors, projects underway, budgets, timelines, etc. • Manages vendor relationships • Share traffic reports across the organization and communicates regularly on status of new developments, traffic and other key metrics
Media and Social Media Outreach Lead	• Introduces organization to key traditional, new and social media outlets and journalists • Identifies projects and topics likely to draw media attention • Pitches above topics to media outlets • Guides staff in drafting and finalization of content for blogs and news sites • Develops and maintains an organizational media outreach list • Creates and distributes press releases
Media and Social Media Content Creator(s)	• Develops traditional, new and social media content for particular initiatives and programs • Works in tandem with editorial and outreach leads
Website Content Entry and Maintenance	• Conducts the day to day content entry and site updates • Runs monthly link verification reports • Runs regular site statistics reports and monitors all site traffic and email • Analyzes statistics with Editorial team to determine improvements and methods for building traffic
Website Usability Specialist	• Continually looks for ways to improve the overall site, its function and its usability • Has a keen grasp of the intended target audiences and understands how they may interact with the site • Looks to continually improve the user experience • Conducts usability tests • Analyzes statistics and works with editorial team on improvements • Suggests and recommends new features, applications and other technology to support the overall goals
Designer	• Provide visual guidance and direction • Locate, purchase, create or procure images as necessary

Communications Leadership and Policy

Managing Outreach in the Small Nonprofit: Should We Hire a Communications Director?

With the right hire, a dedicated communications staff member or external vendor can serve to develop and coordinate communications plans, establish and refine organizational messaging, create and edit original content and provide specialized website, media and social media supports. Someone must have ownership of your organization's communications strategy and execution—and it's always best to have that be their primary focus.

Even with a staff member or vendor focused exclusively on outreach, however, your organizational leadership must continue its involvement in communications planning and execution to reach your shared goals. An outreach strategy developed and executed separately from the rest of your programs and operations will be doomed to failure.

Establishing a Social Media Policy

The instantaneous and interactive nature of social media makes it especially important to establish a set of organizational understandings around its use. Additionally, the blurred boundaries it can create between personal and professional communications should be cause for increased attention. Organizations are advised to create a social media policy that outlines:

A. **Who is responsible for creating social media content and what process will be in place for its approval**
B. **Issues or types of content that should be treated with care or avoided**
C. **Guidelines/recommendations for staff on their personal use of social media as it relates to the organization or issue area**
D. **Basic information as to how to respond to negative/critical posts and recover from slip-ups**
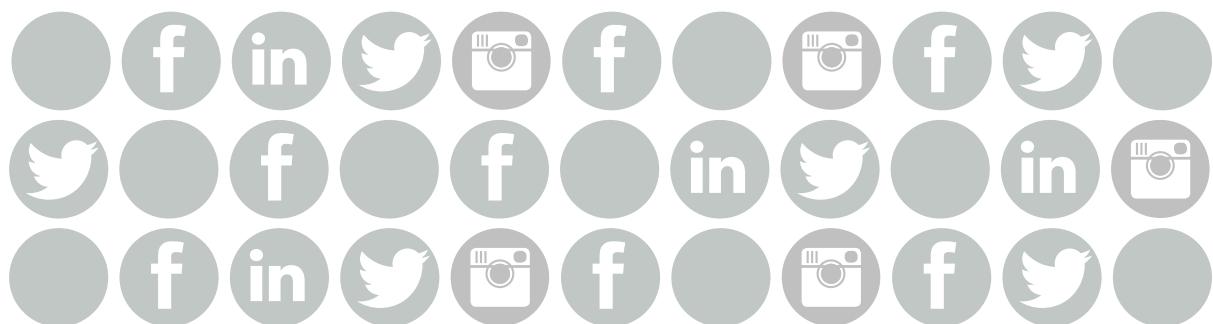
Who we are:

Use your mission statement or another descriptive statement here.

What we stand for:

Identify organizational priorities and topics of critical interest

Types of things we promote and share:

Note broad categories of items that you'd like to share through social media – resources, events, relevant news posts, etc.

How we manage our online identities:

Describe where login information is stored, how communications calendar is maintained and the roles of relevant staff members. Note any relevant committees or regular meetings.

When posting as "Education Organization" to Facebook or Twitter

Official posts should be made by individuals identified above. All other staff should post as themselves or send ideas to the above-mentioned staff.

Think in multiple contexts. A comment that makes sense in one context could appear insensitive or ignorant in another.

Write thoughtfully and carefully. Informal language is fine, but avoid slang and inappropriate terms.

Do not provide personal editorials on controversial topics. You are writing as a representative of Education Organization.

Make sure we have permission when using quotes, photos or videos.

Be careful when posting about:

> Religion and religious beliefs
>
> Politics, political candidates
>
> Educational controversies
>
> Other controversial topics
>
> Topics of interest to our funding sources

When posting as yourself in online forums

You are encouraged to participate in social media and to contribute to online conversations that relate to Education Organization's work. The best posts are ones that advance the conversation in a meaningful, respectful, and accurate way. Avoid hyping Education Organization and stick to discussions where you feel that you can make a useful contribution.

Use common sense. Think before you post and be aware that anything you share online could end up in front of an unintended audience. Behave online as you would in any other public setting – you are ultimately responsible for what you share.

Even when you post as yourself, you may be viewed as a representative of Education Organization. Please keep this in mind.

Tracking and Evaluating Your Impact

How will you know if you are making progress towards the goals of your communications plan? There are several ways to think about performance indicators for media channels, and you can choose to focus on one or more that most closely align with your communications goals.

Views

How many people see one of your posts or visit your social media homepage. This could be useful, for example, if your goal is to share a video as widely as possible.

Stories

The number of articles, blog posts and social media posts created about your initiative in channels that reach your target audiences.

Followers

The number of users that subscribe to your social media channel. Although a large fan base is not an end goal, having more followers can indicate how many people are aware of your work and increases the likelihood that anything you share will be viewed more broadly.

Shares

How many individuals share, like or retweet a post; or forward an email that you send on.

Conversion

How many of the people that follow you, view a particular post or read an article go on to sign up for an e-news-letter, donate to a campaign, download a report or register for an event? Conversion can be more difficult to track than views or followers, but it is also a clearer indicator of progress towards a particular goal.

Identify key metrics for your overall initiative and establish a regular check-in on those metrics appropriate to the length of your outreach campaign. Through your regular review, you'll be able to get a sense of which activities are most effective and adjust your strategy as needed.

Key Management Tools

Take advantage of selected online tools that can help you to plan, monitor and evaluate your outreach and online presence:

Hootsuite

Hootsuite and similar tools connect to your social media identities and enable you to set up social media content for delivery on a particular date and time. You'll still need to respond "in the moment" to news and opportunities, but you'll be able to better manage your time on social media by setting up some content in advance. Hootsuite also offers options for monitoring your social media metrics.

Google Alerts and Social Search Engines

Create Google Alerts on your organization's name along with specific keywords to track online activity around your campaign and interest areas. Regular (at least weekly) searches for those same keywords on Social Mention, Social Searcher or another social search site will pull up Twitter, Facebook and other online content that can help to identify retweets and posts.

URL Services

Bit.ly and Ow.ly are URL shortening services that are particularly useful for tweets, enabling you to save precious character space. On Twitter and in other forums, including emails, using these services will enable you track how many individuals click on a given link.

Celebrate Success

Congratulations on building your communications plan. As you launch your message and begin to see what's resonating with your target audiences and which communication channels are showing the most promising results, you'll want to refine your strategy accordingly.

Take time when you can to pause and share the fruits of your labor with your colleagues, knowing that effective communications are essential to fulfilling your mission and meeting your organizational goals.

COLLABORATIVE

Collaborative is a learning-focused consulting firm that works to:

Connect networks of people in learning communities within and across organizations to significantly enhance their knowledge and capacity;

Create, share, and use knowledge to generate new ideas and improve performance; and

Engage diverse stakeholders to go beyond traditional approaches, create solutions aligned to the values of the people affected by them and build sustained attention to complex problems.

For more than 10 years, Collaborative has partnered with leading education organizations, foundations, government agencies, school districts and community organizations that share our values and commitment.

We empower our clients by working to build capacity—not dependency—and by providing an array of strategies, systems and tools that are continuously evolving.

We provide access to and connections within a growing network of organizations, researchers, consultants, practitioners and community members whose collective content knowledge, expertise and experience supports the learning and growth of everyone in the network.

We build tools, processes and products that are intended to accelerate learning and productivity and that regularly produce breakthrough results.

We are passionate about helping improve public education within the United States and across the world through learning and collaboration, and communications and engagement. We encourage readers to share this publication broadly and to find additional resources for building effective communication strategies on the Collaborative Communications website at www.collaborativecommunications.com and Twitter @collaborative_.