Tech-Savvy Communications
A Toolkit for Nonprofits
Thanks and acknowledgements

This toolkit is the work of many hands at NPower Seattle and in the Seattle nonprofit community. To the nonprofit staff who assisted us with this project, we offer thanks for their insights and for the work they do every day. Special acknowledgement goes out to the following community partners:

- the Tech-Savvy Communications partners whose key messages about their technology funding needs informed the development of the methodology presented in this toolkit
- participants in our “Telling Your Story” workshops whose observations about communications challenges appear throughout this workbook

Special thanks is due as well to the following advisors and “idea bouncers”:

- the Communities Connect Program of the Center to Bridge the Digital Divide, our primary funder for the work on Tech-Savvy Communications
- the funders who provided feedback on key messaging about technology requests in our survey
- BuzzBee Company, Seattle, for reviewing the toolkit workbook and providing content to fill in the gaps
- Social Venture Partners Seattle, [http://www.svpseattle.org](http://www.svpseattle.org), for sharing their original Message Framework and inspiring us to create a model for other nonprofits to follow

— NPower Seattle
December, 2006
# Table of Contents

Thanks and acknowledgements

Executive Summary

Introduction

Who this toolkit is for

How this toolkit can help you improve your communications

The "tools" included in this kit

Background

How NPWek Seattle’s Tech-Savvy Communications partnerships informed this toolkit

Tech-Savvy Tactical Communications Planning

What is a Communications Plan?

Why do you need to have a Tech-Savvy Tactical Communications Plan?

Creating Your Tech-Savvy Tactical Communications Plan

Laying the Groundwork

A. Explore your environment: External scan

B. Fill in the foundations of your Message Framework

It’s Your Turn exercise

Step 1: WHO to Influence-- Identify the “audience”

A. What’s an “audience”?

B. How do I identify my audience(s)?

C. Why is this step crucial, and why does it come before messages and tactics?

It’s Your Turn exercise

Step 2: WHAT to Say-- Develop the key message

A. Develop your key message(s)

B. Test and refine your message(s)

C. Develop talking points

It’s Your Turn exercises

Step 3: HOW to Reach Your Audience-- Evaluate communications channels and tactics

A. Channels and tactics

B. Making effective use of technology

C. Evaluating channels and tactics

Channels and Tactics Charts

It’s Your Turn exercise

Take Action

A. Craft communications objectives

B. Check yourself against best practices

It’s Your Turn exercise

Examples from the Field

Blogging

Website and Email Signature

Social Networking Sites

Congratulations and Next Steps

Resource List

Appendix

Summary of Funder feedback from NPWek Seattle’s 2006 survey
One of the consistent observations from NPWder Seattle’s work helping nonprofits use technology to better serve their communities is that many nonprofit organizations are doing amazing work, yet they struggle to tell their story in an effective way. The Tech-Savvy Communications toolkit is our response to the need we saw for a resource to fill in the missing pieces by 1) providing an overview of effective communications for nonprofits, and 2) emphasizing technology as a tool in effective communications.

The process described here for developing tech-savvy communications begins with laying some important groundwork, progresses from there to three steps of 1) identifying your audience, 2) creating effective key messages, and 3) evaluating communication tactics, and finishes with taking action by crafting your communications objectives and checking yourself against best practices. Along the way we place special emphasis on taking the time to identify your audience(s). That’s because clarity about the audience and its perceptions, objections, and experience is the foundation for both developing clear messages that speak to your audience’s interests, and for identifying appropriate tactics to deliver the message.

The Tech-Savvy Communications toolkit is a practical, interactive guide that offers you opportunities to apply the information and suggestions you find here, and points you to resources to learn more. The “tools” included in this kit include:

- “It’s Your Turn” exercises, providing a push to apply what you’ve learned
- The Message Framework, a quick reference guide for your leadership and staff as well as any marketing/PR consultants that you bring in to assist you
- The Channels and Tactics spreadsheet on the Resource CD, a “live” version of the Communications Channels charts printed in the workbook
- The Resource List, offering links to articles and websites to learn more about Tech-Savvy Communications for your organization.
- The Summary of Funder Feedback, offering frank advice and commentary from our survey of institutional funders and individual donors on effective messaging in requests for technology funding.

Tech-Savvy Communications is an emerging expertise for most nonprofits, and new technology options arrive on the scene at a dizzying pace. We leaned on a number of experts in the field of communications and our colleagues in the nonprofit sector to pull together the methodology and tips presented in this toolkit. We look forward your comments and feedback as the conversation continues.
Introduction

Who this toolkit is for
Our target audience for this toolkit is Executive Directors of nonprofits, as well as program directors or managers and other staff who are involved with outreach, marketing, communications or development. Welcome to what we hope will be a useful guide to some why’s and how-to’s for telling the story of your organization’s impact by following best practices in communications and by making effective use of technology.

How this toolkit can help you improve your communications
One of the consistent observations from our work helping nonprofits use technology to better serve their communities is that many nonprofit organizations are doing amazing work, yet they struggle to tell their story in an effective way.

More recently, the experience of helping a group of nonprofit partners to develop tactical communications plans in 2006 revealed to us how new the territory is in terms of how-to’s for translating big-picture ideas and goals into manageable, effective communications tactics. We also observed that effective use of technology to support communications is often skipped over in conversations between nonprofits and communications advisors.

This toolkit fills in the missing pieces by 1) providing an overview of effective communications for nonprofits, and 2) emphasizing technology as a tool in effective communications.

- Communications: Telling the story of why your nonprofit organization’s mission matters and how your programs and activities support your mission is a combination of effective messaging and effective delivery. This toolkit offers a methodology and resources to address both aspects, beginning with the important step of identifying your audience.

- Technology: Email, websites, e-newsletters, online videos and other technologies play an increasingly critical role in our world today, and when used effectively they can dramatically enhance the effectiveness of communications effort. The information and exercises in this toolkit will assist you in sorting through the array of technology options to determine which tools make the most sense given your organization’s goals and budget.

Technology Fundamentals Remain Elusive

“Despite believing in the importance of technology to their missions, a surprising number of organizations are not taking advantage of basic online organizing techniques, such as collecting email addresses, sending out mass emails, posting news and information on websites, providing materials for download, and processing donations online.”

— from Online Technology for Social Change: From Struggle to Strategy, a research project of dot organize
**Introduction**

**The “tools” included in this kit**

The Tech-Savvy Communications toolkit is a practical, interactive guide that offers you opportunities to apply the information and suggestions you find here, and points you to resources to learn more.

- **The “It’s Your Turn” exercises** that accompany each section push you to apply what you’ve learned and create the basic pieces of your own Tech-Savvy Communications Plan. The “It’s Your Turn” worksheets are available as customizable Word documents on the toolkit Resource CD.
  - It’s Your Turn, Laying the Groundwork A: Conduct an External Scan
  - It’s Your Turn, Laying the Groundwork B: Start to map out your Message Framework
  - It’s Your Turn, Step 1: Identify Your Audience
  - It’s Your Turn, Step 2A: Develop and Refine Key Messages
  - It’s Your Turn, Step 2B: Complete your Message Framework
  - It’s Your Turn, Step 3: Evaluate Communications Channels and Tactics
  - It’s Your Turn, Take Action: Craft Communications Objectives and Review Best Practices
  - Workplan template

- **The Message Framework** is a quick reference guide for your leadership and staff as well as any marketing/PR consultants that you bring in to assist you with audience identification and message development. You begin work on the Framework in the “Laying the Groundwork” section, and your work continues in Step 1 and Step 2. See the toolkit Resource CD for customizable Word versions of the Message Framework template.

- **The Channels and Tactics spreadsheet** on the Resource CD allows you to edit content, and to sort by the criteria that is most important to you in order to choose the most effective delivery channel. The spreadsheet is a “live” version of the Communication Channels charts that appear in this workbook in Step 3: HOW – Evaluate communications channels and tactics.

- **The Resource List** offers links to articles and websites to learn more about Tech-Savvy Communications for your organization. A partial list is printed at the end of this workbook and the full list is available on the toolkit Resource CD.

- **The Summary of Funder Feedback** printed in the workbook Appendix offers frank advice and commentary from our survey of institutional funders and individual donors on effective messaging in requests for technology funding.
Background

How NPower Seattle’s Tech-Savvy Communications partnerships informed this toolkit

In 2006 NPower Seattle partnered with five local nonprofit organizations to facilitate the development of Tactical Communications Plans. This process of identifying audiences, creating effective key messages and evaluating communications tactics led us to:

- codify the communications planning methodology presented in this workbook
- create the exercises and tips for developing effective key messages which are included in Step 2: Develop Key Messages
- solicit feedback from funders about what they look for in messaging and in proposals. Our survey of funders gathered feedback on a sample message about the need for technology funding. The resulting feedback and suggestions are incorporated into the exercises and case studies presented throughout this workbook, and a summary of all of the funder survey results appears in the Appendix.
Tech-Savvy Tactical Communications Planning

What is a Communications Plan?
Communications planning looks at how you communicate with your various audiences: clients, supporters, contributors, media contacts, vendors, distributors, employees and others upon whom your organization relies to succeed. An effective communications plan reflects your organization’s mission, goals and objectives, and is integrated into daily operations. So a communications plan informs everything from the content of your website to the frequency of your contacts with local newspapers.

Typical elements of a communications plan include:
- Strategic direction: defining goals and objectives, organizational characteristics, competitive environment, and target audiences.
- Content: clear messages and talking points tailored specifically to your target audiences
- Channels: effective delivery mediums for your messages, such as personal presentations, email newsletter, blogging.
- Activities: types of communications such as advertising, promotions, PowerPoint presentations.
- Timing: Suggested frequency of activities

As with any kind of planning there are two “flavors” - strategic and tactical.
- A strategic plan looks broadly at all aspects of the organization and takes a big-picture perspective on developing programs and processes to support the organization’s mission and strategic direction.
- A tactical plan takes a narrower and often shorter term look at how to meet goals. For example, a tactical communications plan might focus on addressing funding needs for technology, or focus on expanding communications activities in the six months leading up to an organizational fundraising event.

We’re talking about a Tactical plan
Our focus in this toolkit is on tactical communications planning. Our experience working with nonprofits has taught us that starting with a tactical plan is a practical and productive approach for the communications needs of most small to mid-sized organizations. Starting with a tactical plan is more likely to produce the results and momentum that many Executive Directors and program managers are looking for.

That being said, a tactical plan must align with broader organizational priorities and to the mission. Coordinating the tactical plan with the bigger picture of organizational strategy will save time for staff who develop the plan and attempt to implement it, and send consistent signals to your external audiences.

We’re talking about a Tech-Savvy plan
“Tech savvy” refers to our emphasis on technology as an essential element of communications efforts. Effective use of technology can dramatically increase the number of people you reach and how well the message is received. Unfortunately, technology is often underemphasized in traditional communications planning. We propose tech-savvy communications planning as a new breed that combines smart tactics with key strategic planning to get the most out of your communications investment.

Tech-Savvy resources in this toolkit:
- The cumulative result of doing the “It’s Your Turn” exercises will be to produce your own Tech-Savvy Tactical Communications Plan.
- A Communications Channels and Tactics chart emphasizing tech-savvy channels is printed in Step 3 of the workbook, and is available as an Excel file on the toolkit Resource CD.
- The Resource List includes articles and Web resources about implementing tech-savvy communications channels.
Tech-Savvy Tactical Communications Planning

Why do you need to have a Tech-Savvy Tactical Communications Plan?
How many of the questions on the list below could you answer “yes” to today?

Scanning Your Communications Landscape

- Do you have a storage place to collect facts, statistics and other data relevant to your mission/communication issue?
- Have you prepared a Frequently Asked Questions (FAQ) document for your organization and its programs?
- Do you have a template for press releases that follows the Associated Press guidelines?
- Are you developing relationships with editors and reporters of influencing publications?
- Do you have a database of categorized contacts?
- Do you maintain an updated Wish List?
- Is there a prominent place on your website for publishing your Wish List?
- Are you updating your website on a regular basis?
- Have you created an online home for your media communications (fact sheets, press releases, contacts)?
- Do you have a clearly defined message framework that helps you communicate the “right” information to the “right” people using the “right” method?

The fact that most nonprofits would leave at least a few blanks on the list points to a struggle with communicating effectively to generate support, which is frustrating when you know that your programs are well-run and high-impact.

By completing the planning process in this toolkit, you’ll develop effective messages about your work, make more informed decisions about the methods to use in delivering your messages, and check yourself against communications best practices. (And be able to check off more of those questions!)

Any good communications plan will help you to:

1) explain clearly why your mission matters
2) make the case for support of all kinds (funding, volunteer help, in-kind donations...) based on measurable outcomes and meaningful examples
3) communicate on a regular basis with key stakeholders.

You need a Tech-Savvy Tactical Communications Plan to accomplish these additional goals:

4) dramatically increase the impact of your communications activities by making effective use of technology
5) make the case for technology funding to support your service delivery.

Basic outline for a Tech-Savvy Tactical Communications Plan:

1) Background and context setting
   - Organizational summary
   - External scan
   - Additional ideas and resources to explore

2) Developing effective messages
   - Messaging Framework
     - Target audiences
     - Key messages
     - Talking points

3) Delivering the message
   - Communications objectives
   - Channels and Tactics
   - Best practices checklist

"The Communications Plan puts it all together in one place, and pulls out a bulleted list of things to work on. We kind of know all of this about how to communicate, but we often forget in the moment about what we’re doing and why. It’s good to have it in black and white.”

-- Alaric Bien, Executive Director, Chinese Information and Service Center

8 Tech-Savvy Communications: A Toolkit for Nonprofits
Creating Your Tech-Savvy Communications Plan

The pull to jump directly to tactics can be almost irresistible for resource-strapped nonprofits that tend to be action-oriented in the area of communications, mostly by necessity. For better results and a more coherent strategy, we’re asking you to resist the temptation to expend a lot of energy sending out information because you feel like you should be doing something, and walk through the steps of tech-savvy communications planning. We think you’ll find it saves you time and money in the end.

The process of developing a Tech-Savvy Communications Plan begins with laying some important groundwork, progresses from there to three steps of identifying your audience, creating effective key messages, and evaluating communication tactics, and finishes with taking action by crafting your communications objectives and checking yourself against best practices.

Along the way we emphasize the importance of identifying your audience(s). That’s because clarity about the audience and its perceptions, objections, and experience is the foundation for both developing clear messages that speak to your audience’s interests, and for identifying appropriate tactics to deliver the message.

Read on for an introduction to each of the steps of the Tech-Savvy Communications planning process, and be sure to try the hands-on “It’s Your Turn” exercises to begin your own plan.

“...The timing was incredibly good for us to develop a Communications Plan. It’s time for a technology update at SEED, and we need to communicate to prospective funders. The plan will make us take the steps to do a better job of communicating with funders.”

--Geraldine Welsh, Deputy Director, Southeast Effective Development
Creating Your Tech-Savvy Communications Plan

Laying the Groundwork: External Scan and Message Framework

A. Explore your environment: External scan

An external scan is an important first step because it informs the eventual development of your key message(s) by pointing out where to fortify, amplify, or re-frame the points you want to communicate. The scan looks broadly at the outside environment to collect assumptions, barriers/obstacles, and to give you an indication of audience thinking.

To conduct an external scan, address any of the areas below where you do not already have data/ impressions:

**Competition:** Investigate all of your direct “competitors” or organizations doing related work
- How do their missions and activities compare or contrast with yours?
- Is there overlap in your services or service areas?
- What is the current quality of the relationship between you and your competitors (cordial, cut throat, distant, non-existent)? How would improving those relationships benefit you?

**Knowledge base:** Gather publicly available information on your communications issue
- Education yourself on the issue to be able to describe clearly what you add to the field and to identify areas where you need to learn more.

**Technology Funding Perspectives: Finding background information**

If your communications issue is your organization’s technology funding needs, TechSoup.org is a great source of background information and specific pointers.

For example, a discussion of how funders assess technology requests in CompassPoint’s “The Accidental Techie” by Sue Bennett, reports that funders generally want answers to the following:

- Is the technology request too expensive?
- Is it too complicated?
- Is it too much to do at once?
- Does it relate to the organization’s mission?
- Does it relate to the foundation’s mission?
- Will limited staff resources be drained during implementation?

Summary available at http://www.techsoup.org/learningcenter/funding/page4246.cfm
Creating Your Tech-Savvy Communications Plan

**Perceptions:** Informally survey your customers, clients and other partners about your work

- Ask about their perceptions of what you do well (programs, events, customer service, etc.) and where they would like more information.

**What’s working:** Survey a current “target audience” about your communications

- Use a web-based survey, phone calls or meetings to survey a current audience such as customers and clients, funders, or volunteers. You are essentially conducting a “market research survey”, but be sure to scale your level of effort to match what you’ll spend on your communications.

**Challenges:** Identify obstacles that exist to your communications issue.

- For example, is your mission controversial or obscure, requiring education as a component of your communications?

Often an external scan is best done by either a team of staff members or an outside consultant – otherwise the work gets lost in the shuffle of one staff member’s responsibilities.

---

**Technology Funding Perspectives: Sample External Scan results**

(Sample content from external scan sections of Tactical Communications Plans developed recently by NPower Seattle)

- “As the main service provider in South King County, Nonprofit X competes with organizations from North and East side communities where more funding is available from the local community. In addition to asking for funds from outside its community, Nonprofit X must re-frame the issue of human services as one of a “hand up” versus a “hand out.” Also, some prospective donors perceive Nonprofit X as a government agency that does not require donations.”

- “Nonprofit Y recognizes several nearby housing providers and development associations as competitors. The Executive Director keeps in touch with the organizations regularly.”

- “Nonprofit Z has not experienced any significant hurdles to funding technology requests. However, its name has been a barrier: some funders assume Nonprofit Z’s constituent base is too narrowly-focused (small) to warrant significant donations. Nonprofit Z is not planning a name change because the current name is descriptive of its client base. Another challenge is that funders approached to date resist supporting existing services and staffing instead preferring to fund new programs.”
Are you ready to get started? For a step-by-step description of conducting an external scan, and tips for keeping the process on track and manageable, see the “Laying the Groundwork A: Conduct an External Scan” worksheet on the toolkit Resource CD.

---

**Laying the Groundwork A: Conduct an External Scan**

1) **Brainstorm questions and tasks**

Gather your Executive Director and program directors/managers and facilitators, a list of questions to pose and information to gather about external perceptions about your organization’s mission, programs and impact. Draw from the list below to get started. Add questions pertinent to your organization, the issues you tackle, and the communities where you work.

**“Starter” list of external scan questions and tasks:**

**Competition: Investigate all of your direct “competitors” or organizations doing related work**

- Who does the same work that you do locally, regionally and nationally?
- How do their missions and activities compete or contrast with yours?
- How does your work overlap with theirs?
- How does your work contrast with theirs?
- Is there overlap in your services or service areas?
- What is the history of your relationship with your competitors?
- What is the current quality of the relationship between you and your competitors (cordial, arm’s length, distant, non-existent)? How would improving these relationships benefit you?
- What alliances or partnerships currently exist or are in the works?
B. Fill in the foundations of your Message Framework

A major challenge in creating a messaging strategy is keeping track of all the moving pieces. Messaging is not a one-way street of putting time-honored, unchanging information out there for the general public to consume. It’s a two-way process of creating the most effective messages possible, and listening to your audiences about what works and what doesn’t -- in order to adapt. This can leave you juggling a jumble of messages, talking points, and audiences, while feeling pressured by a sense that somehow you need to work your message in to every conversation.

One of the best ways to respond to this challenge is to take a snapshot in time by writing it all down on one piece of paper that is easily shared and easily updated – your Message Framework. The Message Framework then becomes a reference point for the Executive Director who’s heading out for lunch with a prospective donor, for the program manager who is preparing to present at a conference, and for the staff person who greets visitors at the front desk.

Here’s how it works:

Some foundational pieces on the Framework won’t change (or at least not often)

- Positioning/philosophy
- Tagline
- Elevator Speech

The remaining sections of the Framework capture your current thinking on messaging, and are the parts that you will adapt to reflect adjustments in your goals and input from your audiences.

- Audiences
- Benefits and Attributes
- Features

---

**Message Framework**

<table>
<thead>
<tr>
<th>Positioning</th>
<th>Example: The Good Nonprofit bridges cultures and generations by creating opportunities for immigrants and their families to succeed. We partner with other service providers to leverage our collective expertise and resources to positively impact our community.</th>
</tr>
</thead>
</table>
| Tagline     | Examples:  
- Touching lives, creating opportunities  
- Investing in the future  
- Putting technology know-how in the hands of nonprofits |
| Elevator Speech | Example: TGN is a community center that opens doors to resources. TGN provides a wide range of valuable services enabling families, seniors and youth to positively participate and thrive in our community. |
| Audiences   | Example:  
- Funders  
- Most interested in how their investment can make a greater impact |
| Benefits and Attributes | Example:  
- Impact on poverty  
- TGN’s outreach on the Earned Income Tax Credit and free online tax filing tools provides a way to make a greater positive impact on the community |
| Features    | Example:  
- The EITC has been credited with lifting more people out of poverty than any other single benefits program, and over $75 M goes unclaimed in WA every year.  
- Our outreach and workshops are reaching low-income people who are eligible but who did not previously know about the credit |
Creating Your Tech-Savvy Communications Plan

It’s important to note that this message framework is an internal tool. This isn’t something that clients, funders or other partners will see. It’s something that staff will use to guide their own communications, and it will also guide the key messages being conveyed in further collateral development.

Executive buy-in on the messages and the use of the Framework is essential if this is to be an effective tool. If your Executive Director is not involved in developing the Message Framework, be sure he or she buys in to both the content and its use by staff throughout the organization. It’s helpful if the ED sends a clear signal about the importance of consistent messaging by being the one to present the Framework to other staff, and by publicly using the Framework in her or his own communications.
The Message Framework template in this toolkit is a starting point for your one-page summary. To get started, see the It’s Your Turn worksheet, “Laying the Groundwork B: Start to Map Out Your Message Framework” on the toolkit Resource CD.

If you follow this toolkit, you’ll be guided to fill in the foundations of your Message Framework in this initial exercise, and you’ll complete the remaining sections in Steps 1 and 2.
A. What’s an “audience”?

“Audiences” are types of people who you can clearly define by common characteristics such as what issues they care about and how they access information. As Spitfire Strategies points out in their Smart Chart, “Audiences such as urban males under 25, suburban soccer moms, businessmen who travel frequently, or family farmers are well defined. How you reach each of them is dramatically different. Remember, your target audience already has its own thoughts, opinions and misperceptions about your issue.”

B. How do I define my audience(s)?

Often the process of identifying target audiences is as basic as looking at the characteristics of who you’ve been serving or who you would like to serve. “For example, if you provide early childhood education programs, your target audience for clients may be parents with children up to the age of 5. If your mission is environmental education through eco-tourism, your target audience may be travel agents or independent travelers who use the Web to plan their vacations”, offers Sally Little in her article “Nonprofit Strategies: Communications plan helps your nonprofit”, on bizwomen.com at http://www.bizjournals.com/bizwomen/pacific/content/printable.html?story_id=127636

Common ways to further define audiences are to list what you know about a target group’s knowledge, attitudes and behaviors as they relate to your issue. For help with this process, see the Kellog Foundation Communications Plan template on the toolkit Resource CD, and the Benton Foundations’ online guide to Strategic Communication in the Digital Age, at http://www.benton.org/publicibrary/practice/Toolkit/planning.htm.

Sometimes developing a persona, or hypothetical profile, is a useful exercise. One communications advisor points out that “Developing a hypothetical stand in for your nonprofit’s actual audiences enables your communications and development teams to stand in the audiences’ shoes. Personas focus the communications initiatives on supporting audience needs and interests. And you’ll find far greater success designing a communications plan or a program’s marketing message that meets the goals of a specific person, rather than trying to plan or write for the hazily-defined needs of many.” (Nancy Schwartz in “Using Personas to Connect with Your Target Audiences, at http://www.nancyschwartz.com/nonprofit_persona_development.html)

C. Why is this step crucial, and why does it come before messages and tactics?

Identifying your audiences points you to specific content for your message and to the best method for delivering your message. For example,

- Understanding the needs and goals of your audiences points you to the messaging content to use in order to describe your organization in terms of what’s important to a particular group.

- Understanding your target audience’s behavioral patterns points you to the communications channels and tactics to use to deliver your message. Knowing your audience helps you to deliver your message in ways that reach the audience and capture their attention.
For help with this step, see the It's Your Turn worksheet, “Step 1: Identify Your Audience(s)” on the toolkit Resource CD. The worksheet guides you to fill in the audience columns in your Message Framework and to add a note for each audience about their particular interest or motivation.
A. Develop your key message(s)

The goal in drafting a key message is to summarize, in 1-2 brief paragraphs, the essence of your mission, and to offer specific examples of your impact. Examples of your impact could be program outcomes (usually described as behavior changes that result from your work, such as low-income clients using free online tax tools to file for the Earned Income Tax Credit and being lifted out of poverty) or individual stories that exemplify how your work improves the lives of your clients.

The process of developing a key message involves thinking from a funder’s or supporter’s perspective.

- What does the individual or the organization need to know about the impact of your services on a social problem or on a specific group of people who need your help?
- Why is your work important and what specifically will be improved or solved by the addition of funding?
- Why should a community volunteer contribute to your work – what larger effort are they joining?

“Your messages deliver important information about the issue and compel the targeted audience to think, feel or act.”

--- Elements of a Strategic Communications Plan, Kellog Foundation (see toolkit Resource CD)

“Technology Funding Perspectives:
Feedback from funders on a sample message about the need for technology funding
(See the Appendix for a complete summary of feedback from NPower Seattle’s 2006 survey)

Consistently, from both donors and institutions, was the request to connect support of the mission to the request for support.

Link the need to your mission:
- “How will this technology further the organization’s mission?”
- “Bring need back to mission and service to the clients”
- “Why the need for better access within the organization to new technology?”

Quantify the results and give specific examples:
- “How will the technology improve service and the measurement of outcomes?”
- “How many more clients will you serve?”
- “How will you better serve your clients (number of programs, quality of training sessions...)?”

Step 2: WHAT to Say-- Develop the key message

B. Test and refine your message(s)
Getting feedback on your message is essential. You are probably too close to the work to have a perspective on what’s important. You could be missing some important aspects, or going into way too much detail in other areas. As Steve Sullivan of the Woodland Park Zoo in Seattle points out, “It’s important to make part of it about them and why they should be interested so it connects to their life. So often we start out trying to tell the story about why our work is important and it ends up being all “me, me, me.”

Think of getting feedback from people in ever-widening circles based on their familiarity with your organization and the work that you do.

Once you’ve gathered feedback, take a fresh look at your key message and edit it (in much the same way that you did for your elevator speech if you did the It’s Your Turn exercise in Laying the Groundwork).

• Take out any extraneous details that people skipped or didn’t understand.

• Add in specific examples of your impact based on what people say is missing or unclear.

“I keep going back to the value of getting feedback on the key message. Before, we always talked about the same thing – our needs -- because we thought that was the important thing to communicate. I see now that we need to lead with what we do: how we serve people, and how it ties to mission.”

-- Geraldine Welsh, Deputy Director, South-east Effective Development

C. Develop talking points
Use your research from your External Scan to pull in data and examples that support your message. Offer concise highlights of outcomes, or cite research on the issue that creates the need for your involvement.

“I seem to be experimenting all the time – throw it out there and see if it sticks. One thing I’ve noticed is that I tend to provide too many details about what we do and how. I’ve learned to keep it really simple, at least at first.”

-- Robert Bortner, Community Empowerment Network
Record your Key Messages and Talking Points on your evolving Message Framework, using the It’s Your Turn worksheets, “Step 2A: Develop and Refine Key Messages” and “Step 2B: Complete Your Message Framework”.

The worksheets guide you to

- Draft your key message and talking points
- Create your refined message in response to feedback, and edit to keep the Framework to one page
- Fill in the remaining sections on the Message Framework and make it known throughout your organization
Step 3: HOW to Reach Your Audience -- Evaluate communications tactics

A. Channels and Tactics

What is a “channel?”
The term “channel” refers to the method or route you use to deliver your message. Examples of channels include:

- Broadcast media outlets: radio and television stations
- Print media: daily, weekly, monthly publications, as well as trade journals
- Publicity: Advertising, fliers placed at retailers and other high traffic “store fronts” such as community centers, libraries, restaurants, bars, laundromats, grocery stores, malls
- Events: community fairs/festivals, street markets, trade shows
- Email: email newsletters, messages in email signatures
- Online media: web sites, social networking sites, blogs, podcasts

Tactics
For the purposes of this toolkit, “tactics” are the marketing and PR activities that you undertake to get your message out. These are scheduled, measurable efforts to get your story placed in newspapers or on radio, to schedule a presentation by your Executive Director at the local Rotary luncheon, to post your video to YouTube, or to post a case study on your website illustrating a program outcome.

B. Making effective use of technology
Recent thinking in the field of communications points to a need to utilize a variety of channels and to be strong in multiple areas, including traditional channels emphasizing print and face to face contact, as well as tech-savvy channels that develop an online presence and voice. As a recent Wall Street Journal article put it, “Reaching potential customers used to be simple: The choices were limited, and consumer behavior predictable. Now, how do you get your message through? Advertisers are trying to win back consumers’ attention with a grab bag of new strategies.” (The Marketing Maze by Brian Steinberg, 7/10/06, p. R1.)

Audience behavior is shifting in several areas, requiring a fresh approach:

- immediacy - people want information now
- interactivity – people expect to be included as producers as well as consumers
- attention span – people are being deluged with information, and respond by becoming “fragmented grazers” who move quickly between topics and channels

In a participatory media world where audiences have come to expect innovation and interactive dialogue, utilizing tech-savvy communications channels becomes essential. Referencing the for-profit world again via the Wall Street Journal article on The Marketing Maze, “Companies are plowing money into the internet, and finding creative ways to take advantage of the medium’s strengths. For instance, they’re targeting sales pitches to particular audience segments with unprecedented precision, and creating ads that don’t look like ads, such as humorous Web sites that people pass along to their friends.”

Making effective use of technology via tech-savvy communications channels can help nonprofits capture the attention of new supporters, and to reinforce the value of the investment for existing supporters. This is not an endorsement for jamming your message into every available technology channel. Effective use is an outcome of planning and a realistic assessment of what your organization has the capacity to tackle.

"Your choice of a dissemination vehicle will be impacted by decisions you make about who your audience is and what message you have for them. Similarly, which platform you select will also impact your message and limit your audience. For example, if your target population are likely listeners to radio, you’d want to develop messages appropriate for radio public service ads."


"Video sharing tools are ways to get the remarkable things you do out into the community. The viral aspect of friends telling friends allows your material to get out way beyond any printed flier you have."

-- Michael Hoffman, See3
C. Evaluating channels and tactics

What’s possible?
The following charts present a menu of communications channels, organized on a spectrum from traditional to more tech-savvy. We’ve divided the chart content by roles/perspectives: One chart looks at channels from a decision-maker perspective and the other takes an implementer point of view.

Note: An interactive Excel version of the Channels and Tactics chart is available on the toolkit Resource CD for you to sort and reorganize as you select channels and tactics to fit your needs.

What’s best for your organization?
Sometimes the immediate answer is based on a pragmatic assessment of your capacity (staff time and technology infrastructure) and your budget. We also encourage you to look ahead, to step out of the “what’s possible now” perspective in consider how you might grow the list of channels and tactics that you employ.

Tips for evaluating channels and tactics:
• When evaluating channels and tactics, be sure to refer to the surveys you did earlier in your External Scan. It’s helpful to review the impact of different kinds of communications and what your audiences respond to, so you can better guide the types of communication you invest in. If you know your target audience responds better to a presentation at a luncheon than a banner on a social networking site, pursue what is most effective.

• Some blanket communications are good to grow your audience and by finding them in new areas and to raise awareness, but also discover the target audience’s preferred channel. And don’t flood it.

• Aim for well-timed and well-placed communications to appeal to a target audience at the right time, without bombarding them to the point that they grow annoyed.

• Leave room in your plan for flexibility. Audience needs change, and their use of or awareness of technology changes. Be prepared to move what you do to meet a new need or opportunity. Avoid being so rigid as to not react to something new or you will lose your evolving audience.

“Beware of raising expectations too high by looking more tech savvy than you are. If you make online registration available, for example, people may be expecting an immediate confirmation, when your process takes a while because behind the scenes someone is doing data entry.”

— Emily Bader, Family Law CASA

“The We Are America Alliance set up a text messaging project that will help it spur immigrants through the citizenship and registration process. During a recent trial, the alliance says it sent text messages to 1,100 people asking if they were eligible to vote, got back 10 responses and is now forwarding them registration forms.”

— Uphill Climb: Registering Hispanics to Vote, Wall Street Journal 10/10/06, p. A4
### Channels and Tactics Charts

#### Decision-maker Perspective

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal presentations</td>
<td>Traditional</td>
<td>By far the most effective fundraising activity, the most personal</td>
</tr>
<tr>
<td>Group presentations</td>
<td>Traditional</td>
<td>Efficient way to reach groups of supporters</td>
</tr>
<tr>
<td>Publicity (coverage on newspaper, TV)</td>
<td>Traditional</td>
<td>Seen as more credible than direct mail or other self-promotion methods</td>
</tr>
<tr>
<td>Advertising (print, radio, TV)</td>
<td>Traditional</td>
<td>Can lose control over message, depending on editing</td>
</tr>
<tr>
<td>Public Service Announcement (free TV/radio spot or newspaper event listing)</td>
<td>Traditional</td>
<td>Generally aware of new</td>
</tr>
<tr>
<td>Direct mail appeal</td>
<td>Traditional</td>
<td>Affordable way to reach broad audience</td>
</tr>
<tr>
<td>Print newsletter</td>
<td>Traditional</td>
<td>Gives you a piece of regularly updated collateral to have on hand for open member packets, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Who will you reach?</th>
<th>What will it cost?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal presentations</td>
<td>Individual donors, foundations, local media outlets, media or event sponsor</td>
<td>Low to $100 or less</td>
</tr>
<tr>
<td>Group presentations</td>
<td>Conference attendees, Members of the Chamber of Commerce, or other event sponsors</td>
<td>Low to $500 or less</td>
</tr>
<tr>
<td>Publicity (coverage on newspaper, TV)</td>
<td>General public, TV, radio, or more focused publication/radio station</td>
<td>High to very high</td>
</tr>
<tr>
<td>Advertising (print, radio, TV)</td>
<td>General public for newspaper, TV, radio, or more focused publication/radio station</td>
<td>High to very high</td>
</tr>
<tr>
<td>Public Service Announcement (free TV/radio spot or newspaper event listing)</td>
<td>General public, TV, radio, or more focused publication/radio station</td>
<td>High to very high</td>
</tr>
<tr>
<td>Direct mail appeal</td>
<td>Current donors and members</td>
<td>Low to high</td>
</tr>
<tr>
<td>Print newsletter</td>
<td>Current donors and members</td>
<td>Low to high</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal presentations</td>
<td>Resource intensive: time to prepare, schedule, meet with people, do follow up</td>
</tr>
<tr>
<td>Group presentations</td>
<td>Less targeted than individual presentations</td>
</tr>
<tr>
<td>Publicity (coverage on newspaper, TV)</td>
<td>Can lose control over message, depending on editing</td>
</tr>
<tr>
<td>Advertising (print, radio, TV)</td>
<td>Can be expensive - depends on follow up by reader/listener</td>
</tr>
<tr>
<td>Public Service Announcement (free TV/radio spot or newspaper event listing)</td>
<td>Can be expensive - depends on follow up by reader/listener</td>
</tr>
<tr>
<td>Direct mail appeal</td>
<td>Time consuming to set up, less personal</td>
</tr>
<tr>
<td>Print newsletter</td>
<td>Any time-sensitive information is quickly out of date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Decision-maker perspective: things to consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal presentations</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Group presentations</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Publicity (coverage on newspaper, TV)</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Advertising (print, radio, TV)</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Public Service Announcement (free TV/radio spot or newspaper event listing)</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Direct mail appeal</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Print newsletter</td>
<td>The right reach for this channel</td>
</tr>
<tr>
<td>Channels and Tactics Charts</td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email newsletter</td>
<td>Tech-savvy</td>
<td>Affordable, uses existing technology; drives traffic to website; offers updates to your brand.</td>
<td>Complications with spam filters; administration of unsubscribes; requires regular updating to keep fresh.</td>
</tr>
<tr>
<td>Website</td>
<td>Tech-savvy</td>
<td>Tells your story for you; develop community; recruitment tool.</td>
<td>Requires maintenance to remain fresh and relevant; can't control the content that is shared with your site by sharing your RSS feeds.</td>
</tr>
<tr>
<td>RSS feeds</td>
<td>Tech-savvy</td>
<td>Keeps your website fresh automatically with relevant content; community can subscribe automatically; updating content on events.</td>
<td>You need to create content to send to subscribers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email newsletter</td>
<td>Tech-savvy</td>
<td>Affordable, uses existing technology; drives traffic to website; offers updates to your brand.</td>
<td>Complications with spam filters; administration of unsubscribes; requires regular updating to keep fresh.</td>
</tr>
<tr>
<td>Website</td>
<td>Tech-savvy</td>
<td>Tells your story for you; develop community; recruitment tool.</td>
<td>Requires maintenance to remain fresh and relevant; can't control the content that is shared with your site by sharing your RSS feeds.</td>
</tr>
<tr>
<td>RSS feeds</td>
<td>Tech-savvy</td>
<td>Keeps your website fresh automatically with relevant content; community can subscribe automatically; updating content on events.</td>
<td>You need to create content to send to subscribers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email newsletter</td>
<td>Tech-savvy</td>
<td>Affordable, uses existing technology; drives traffic to website; offers updates to your brand.</td>
<td>Complications with spam filters; administration of unsubscribes; requires regular updating to keep fresh.</td>
</tr>
<tr>
<td>Website</td>
<td>Tech-savvy</td>
<td>Tells your story for you; develop community; recruitment tool.</td>
<td>Requires maintenance to remain fresh and relevant; can't control the content that is shared with your site by sharing your RSS feeds.</td>
</tr>
<tr>
<td>RSS feeds</td>
<td>Tech-savvy</td>
<td>Keeps your website fresh automatically with relevant content; community can subscribe automatically; updating content on events.</td>
<td>You need to create content to send to subscribers.</td>
</tr>
</tbody>
</table>
# Channels and Tactics Charts

<table>
<thead>
<tr>
<th>Channel</th>
<th>Benefits</th>
<th>Type</th>
<th>Drawbacks</th>
<th>Who will you reach?</th>
<th>What will it cost?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blog (a website of a site where updates are made in a reverse chronological order)</td>
<td>Requires regular updates, increases search engine visibility, helps establish expert status</td>
<td>Tech-savvy</td>
<td>Requires your audience to have software or device to receive content, requires technology expertise</td>
<td>Anyone who visits your site or subscribes to your blog feed</td>
<td>Low-Medium</td>
</tr>
<tr>
<td>Podcast (audio files distributed over the internet for playback on mobile devices and personal computers. In general, these files contain audio or video, but also could be images, text.)</td>
<td>Requires your audience to have software or device to receive content, requires technology expertise</td>
<td>Tech-savvy</td>
<td>Requires development and hosting of content, requires technology expertise</td>
<td>Anyone with a cellphone</td>
<td>Low</td>
</tr>
<tr>
<td>Instant messaging</td>
<td>Requires your audience to have software or device to receive content</td>
<td>Tech-savvy</td>
<td>Requires technology expertise</td>
<td>Anyone with a cellphone</td>
<td>Low</td>
</tr>
<tr>
<td>Video and audio file sharing</td>
<td>Requires equipment to create the footage. Requires equipment to edit the files.</td>
<td>Tech-savvy</td>
<td>Requires equipment to create the footage.</td>
<td>Anyone who finds your video file or vlog on a site like YouTube, could be sent to cellphones.</td>
<td>High</td>
</tr>
<tr>
<td>Channel</td>
<td>Type</td>
<td>Benefits</td>
<td>Who will you reach?</td>
<td>What will it cost?</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------</td>
<td>----------------------</td>
<td>--------------------</td>
<td></td>
</tr>
<tr>
<td>Social networking sites</td>
<td>Tech-savvy</td>
<td>Grassroots networking</td>
<td>Anyone who follows you on the SNS or in networking communities</td>
<td>Zero</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Low = $0, medium = $500, high = $5,000</td>
<td></td>
</tr>
</tbody>
</table>

**Channels and Tactics Charts**

26 Tech-Savvy Communications: A Toolkit for Nonprofits
## Channels and Tactics Charts

### Implementer Perspective

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Technology required to add this channel</th>
<th>Infrastructure needed before adding this channel</th>
<th>Ongoing technology support needs</th>
<th>Technology required to troubleshoot</th>
<th>Key skill sets and L&amp;D projects for professional development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional</td>
<td>Traditional</td>
<td>Conference call and virtual meeting software</td>
<td>Up-to-date hardware and software</td>
<td>Powerpoint and webinar training</td>
<td>Technical troubleshooting</td>
<td>Social media management and content creation</td>
</tr>
<tr>
<td>Print</td>
<td>Traditional</td>
<td>Print software</td>
<td>Paper management systems</td>
<td>Print management training</td>
<td>Print troubleshooting</td>
<td>Print design software</td>
</tr>
<tr>
<td>TV</td>
<td>Traditional</td>
<td>Video editing software</td>
<td>Studio equipment</td>
<td>Video production training</td>
<td>Video troubleshooting</td>
<td>Video editing software</td>
</tr>
<tr>
<td>Online</td>
<td>Traditional</td>
<td>Online course software</td>
<td>Website management systems</td>
<td>Online course management training</td>
<td>Online course troubleshooting</td>
<td>Online course development software</td>
</tr>
<tr>
<td>Social Media</td>
<td>Traditional</td>
<td>Social media management software</td>
<td>Social media platform access</td>
<td>Social media management training</td>
<td>Social media troubleshooting</td>
<td>Social media analytics software</td>
</tr>
</tbody>
</table>

Now that you’ve finalized your plan, you may want to consider:

- **Channels and tactics:** Consider the different channels and tactics you will use to reach your audience. Identify the key message points and plan your content calendar.

- **Video:** Plan and produce high-quality videos for your channels, including YouTube, Facebook, and Instagram.

- **Social media:** Use social media platforms like Twitter, LinkedIn, and Instagram to engage with your audience.

- **Email marketing:** Develop a robust email marketing strategy to nurture leads and promote your organization's initiatives.

- **Website:** Ensure your website is up-to-date and optimized for search engines.

- **Google Analytics:** Use Google Analytics to track website traffic and user behavior.

- **SEO:** Optimize your website for search engines using relevant keywords and meta descriptions.

- **Content creation:** Create high-quality content like blogs, articles, and infographics to engage your audience.

- **Public relations:** Build relationships with journalists and media outlets to secure media coverage.

- **Digital advertising:** Use digital advertising to reach a wider audience.

- **Customer support:** Implement a robust customer support system to address customer inquiries and concerns.

- **Data analysis:** Use data analysis to track the effectiveness of your campaigns and identify areas for improvement.

- **Feedback:** Gather feedback from your audience to improve your campaigns and tactics.
### The implementer perspective: how-to's

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>Technology required to add this channel</th>
<th>Technology infrastructure needed before adding this channel</th>
<th>Ongoing technology support needs</th>
<th>Tactics and tips</th>
<th>Now that you’ve tried this, you may want to consider...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct mail appeal</td>
<td>Traditional</td>
<td>Desktop publishing/design software, unless outsource</td>
<td>Computer with capacity to run design software, unless outsource</td>
<td>Staff training on design software if opt to produce in-house</td>
<td>Send a specific individual appeal to constituents. Send a specific business appeal to companies in your market with net worth &gt; $2.5M. Lead with a “hook” to grab the audience’s attention. Develop a good working relationship with a printer and a mail house. Get the printer’s and mail house’s specifications and schedule up front. Have your mailing list NCOA (National Change of Address)-validated every six months, or right before a major mailing.</td>
<td>Email newsletter, Social networking sites, Text messaging, Instant messaging</td>
</tr>
<tr>
<td>Print newsletter</td>
<td>Traditional</td>
<td>Desktop publishing/design software, unless outsource, Digital camera</td>
<td>Computer with capacity to run design software, unless outsource</td>
<td>Staff training on design software if opt to produce in-house</td>
<td>Develop a writing style and tone appropriate for your target audience. Build a photo bank – Take pictures at all events and store in a central location. Develop a good working relationship with a printer and a mail house. Get the printer’s and mail house’s specifications and schedule up front. Have your mailing list NCOA (National Change of Address)-validated every six months, or right before a major mailing.</td>
<td>Email newsletter, Blog, Social networking sites</td>
</tr>
<tr>
<td>Email newsletter</td>
<td>Tech-savvy</td>
<td>Email account, PTP software unless outsource (for HTML version-Only)</td>
<td>Email account, PTP software unless outsource (for HTML version-Only)</td>
<td>Regular production of newsletter</td>
<td>Pick the right tool for you. For help, see the Idealware report “A Few Good Email Newsletter Tools” on the toolkit Resource List. Send out about once every 6 weeks to keep fresh in audience-mind. If possible, HTML mails are more graphically and visually appealing.</td>
<td>Text messaging, Instant messaging</td>
</tr>
<tr>
<td>Email signature</td>
<td>Tech-savvy</td>
<td>Email account that allows a personalized “signature” at the bottom of outgoing messages</td>
<td>Email accounts for all staff</td>
<td>Regular updating of content Training of new staff on using signatures</td>
<td>Write a brief phrase about an upcoming event, client success story, award received or community-oriented version of the mission statement. Include a link to the website if applicable. Train staff how to include and update the phrase in the “signature” area at the bottom of outgoing messages. Refresh the message with all staff at least monthly, or when an event date passes.</td>
<td>Email newsletter, Instant messaging</td>
</tr>
<tr>
<td>Channel</td>
<td>Type</td>
<td>Technology Infrastructure needed before adding this channel</td>
<td>Technology required to add this channel</td>
<td>Technology required to support needs</td>
<td>Tactics and tips</td>
<td>Channels and Tactics Charts</td>
</tr>
<tr>
<td>---------</td>
<td>------</td>
<td>----------------------------------------------------------</td>
<td>----------------------------------------</td>
<td>-------------------------------------</td>
<td>----------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>RSS feed</td>
<td>Tech-savvy</td>
<td>Regular content updates</td>
<td>Website</td>
<td>Software</td>
<td>Regular updates</td>
<td>This is an emerging communication channel and most effective at reaching younger audiences and those who have cellphones but not computer access. Examples of use: e-newsletter, event installations, etc., or contacts with nonprofit organizations.</td>
</tr>
<tr>
<td>Blog</td>
<td>Tech-savvy</td>
<td>RSS feed software</td>
<td>Website</td>
<td>Software</td>
<td>Regular updates</td>
<td>This is an alternative to the phone. For instance, use quick updates to alert subscribers who have not subscribed to the RSS feed.</td>
</tr>
<tr>
<td>Email newsletter</td>
<td>Tech-savvy</td>
<td>Internet connection</td>
<td>Software</td>
<td>Software</td>
<td>Regular updates</td>
<td>This is an alternative to the phone. For instance, use quick updates to alert subscribers who have not subscribed to the RSS feed.</td>
</tr>
</tbody>
</table>

Channels and Tactics Charts

Now that you've tuned into this, you may want to consider...
## Channels and Tactics Charts

<table>
<thead>
<tr>
<th>Channel</th>
<th>Type</th>
<th>The implementation, construct, how-to's</th>
<th>Ongoing technology support needs</th>
<th>Technology infrastructure needed before adding this channel</th>
<th>Technology required to add this channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video and audio sharing</td>
<td>Tech-savvy</td>
<td>Manual recording device, audio recording equipment, editing software, microphone, camera, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Video conferencing platform, video editing software, internet connection, cellular phone</td>
<td>( \text{Digital video camera, microphone, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>Social networking site</td>
<td>Social-savvy</td>
<td>Manual or automated creation of content, website design, social media management tools, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Social networking platform, website design software, internet connection, cellular phone</td>
<td>( \text{Social networking platform, website design software, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>Blog</td>
<td>Blog-savvy</td>
<td>Manual or automated creation of content, website design, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Content management platform, website design software, internet connection, cellular phone</td>
<td>( \text{Content management platform, website design software, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>Podcast</td>
<td>Podcast-savvy</td>
<td>Manual or automated creation of content, recording equipment, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Audio recording equipment, editing software, internet connection, cellular phone</td>
<td>( \text{Audio recording equipment, editing software, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>RSS Feed</td>
<td>RSS Feed-savvy</td>
<td>Manual or automated creation of content, website design, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Content management platform, website design software, internet connection, cellular phone</td>
<td>( \text{Content management platform, website design software, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>Social networking site</td>
<td>Social-savvy</td>
<td>Manual or automated creation of content, website design, social media management tools, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Social networking platform, website design software, internet connection, cellular phone</td>
<td>( \text{Social networking platform, website design software, internet connection, cellular phone} )</td>
</tr>
<tr>
<td>Email Newsletter</td>
<td>Email Newsletter-savvy</td>
<td>Manual or automated creation of content, website design, internet connection, cellular phone</td>
<td>Internet access cost</td>
<td>Email marketing software, website design software, internet connection, cellular phone</td>
<td>( \text{Email marketing software, website design software, internet connection, cellular phone} )</td>
</tr>
</tbody>
</table>

Now that you’ve tried this, you may want to...
Use the “Step 3: Evaluate Communications Channels and Tactics” worksheet on the Resource CD to

- Select channels that make sense for your organization
- Prioritize the tactics and begin a workplan

Additional resources on the CD include

- the “Workplan template” file
- the Excel version of the channels and tactics chart

<table>
<thead>
<tr>
<th>Traditional Channels</th>
<th>Tactics</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Face-to-face</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone surveys</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tech-savvy channels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

It's Your Turn
Tech-Savvy Communications: A Toolkit for Nonprofits

Take action

A. Craft communications objectives
Now that you’ve been through the process of creating your messaging framework and evaluating communication tactics that make effective use of technology, you are primed to swing into action.

Take some time now to write down your communications objective(s) in order to:
- make a clear statement about what you want to accomplish.
- clarify the specifics of the communications effort you are initiating.

Then put your objectives in front of your list of potential channels, refer back to your Message Framework, make sure they all line up, and you are ready to take action.

B. Check yourself against best practices
A review of best practices can come either before you launch your communications effort, or soon after the launch. Either way, you are checking in to make sure you’re operating in a way that maximizes the impact of your communications efforts, and minimizes the possibility for breakdowns or missed opportunities.

Reviewing best practices highlights challenges and can point to potential solutions. For example if the review clarifies areas of weakness in skills for updating your website or managing your print publications, you can then select from a range of solutions, including staff training, hiring a contractor, finding a volunteer, or identifying a communications firm that will offer pro-bono assistance.

A review of best practices can also highlight assets, and can result in some pleasant surprises. For example, there may be someone on your staff who has been looking for a professional development opportunity and would love to research e-newsletter tools to draft a proposal outlining costs and the return on your investment, but no one has ever asked. Taking the time to do a review can reveal hidden skills and interests.

Technology Funding Perspectives: Sample communications objectives
Developing objectives is often an iterative process of creating a draft and then circling back to edit or expand the objective once you’ve tried a few activities. These are initial examples that our Tech-Savvy Communications partners are still fine tuning. How would you improve on these?

- To inform funders about the effectiveness of services provided via technology tools and to educate funders about the positive impact of services on the broader community, in order to generate $50,000 in increased support for technology by April, 2007.
- To educate funders that X is an agency in-need of public financial support and to inform funders that X is a charitable organization, not a government agency, in order to generate $25,000 in support for a new public access technology center by October 2006.
- To advocate for $35,000 in increased technology funding in 2007 in order to provide a safe environment for youth to access the Internet by implementing blocking software, to teach kids by acquiring new educational software, and to improve staff efficiency by upgrading PCs and obtaining graphic design software and technology training.

“Being more tech savvy is key to increasing our age demographic. We reach the boomers with our newsletter, for example, but younger people don’t notice. We’re finding we have to step up and use more tech-savvy approaches to reach younger people.”

-- Gylan Green, Center for Ethical Leadership
It's Your Turn

For help with creating objectives and doing a review of best practices, turn to the “Take Action: Write Communications Objectives and Check Yourself Against Best Practices” worksheet on the Resource CD.

A. Write your communications objectives

Writing down your communications objectives helps you to:
• Make a clear statement about what you want to accomplish.
• Specify the specific steps of the “campaign” you are undertaking.

1. Starting with one of the audiences you identified earlier, or a desired change, write a 1-2 sentence measurable objective for your communications efforts.

Communications objectives often use verbs like advocate, educate, inform, motivate, promote, recruit, etc.

Include the following components:
1) A target audience
2) The nature of change desired from the audience
3) The amount of desired change
4) A target date for the desired change to occur

Insert your communications objective here.
1. Blogging

The Chinese Information and Services Center in Seattle started a blog recently to highlight their construction and capital campaign activities. The blog is connected to their pre-existing website via the “Construction Updates” link in the right hand navigation pane. Link to the blog from their homepage at http://www.cisc-seattle.org/, or directly at http://cisc-seattle.blogspot.com/.

If you’re concerned about your ability to set up a blog, consider the words of Alaric Bien, Executive Director: “I was surprised because I had no idea until maybe 4 months ago what a blog was. It took me about 20 minutes to set it up. It was super easy and it looks decent. And people like it – it’s been effective for our construction process and capital fundraising. The hardest thing is remembering to take pictures every week.”

2. Website and Email signature -- Capitalizing on awards and other unique opportunities

Many communities provide opportunities for “free advertising” of good works and best practices, in the form of awards or other special recognition. Examples of how some of the 10 nominees for NPower Seattle’s 2006 Innovation Award leveraged publicity include:

Website

Eco Encore and the Alzheimer’s Association added the “top ten nominee” medallion provided by NPower to their websites. Eco Encore added text highlighting their participation in the ensuing leadership breakfast series.

Eco Encore site snapshot, from http://www.ecoencore.org/:

---

A blog can be an inexpensive and effective tool for just about any kind of group that prioritizes external communications. Make sure, however, that you have the time and the things to say to become a real part of the conversation.

Email signature
Delridge Neighborhoods Development Association’s Executive Director added the “recipient” award medallion to his email signature the day he received it. This acknowledgement of the award DNDA received will be seen by everyone with whom the ED corresponds, and could be linked to a description of the award-winning project on DNDA’s website.
3. Social Networking Sites

Excerpted from How to Use MySpace to Raise Awareness, by Eileen Cruz Coleman. Available on TechSoup at http://ga0.org/ct/_dacy-F1yzZF/

Designed to help like-minded individuals and organizations connect and share information, social networks are showing promise as low-cost, high-impact marketing channels because they are both highly visited and highly targeted. In particular, many nonprofits are starting to set up profiles on social-networking sites like MySpace to keep “friends” up to date on the latest activities. These friends then invite more friends to join the group and so on, ultimately allowing the nonprofit to reach people well beyond its original circle.

Here’s how the Humane Society of the United States is using MySpace:

The Humane Society has a pretty large network of friends on MySpace, which has been assembled mostly through word of mouth. We post content that speaks to, and is relevant to, our friends’ interests, and don’t just re-post press releases. It takes a lot of time, but it gets our friends engaged and interested in making a difference.

When we post comments on other people’s pages and videos, we include a link to our Web site and to our profile, encouraging others who see the content to be our friends. Our blog is updated almost daily and anything that we want people to take action on or know about right away is bulletined.

Since MySpace is the number one site for video, we’ve recently put all of our videos on the site and feature the most recent or ‘hottest’ one on our main profile page. We provide code on our page so that others can easily re-post the videos to their profiles.

Have you been successful and if so, how?

We’re still working on adding our newsletter signup to our page, but people have been really responsive with our advocacy campaigns. Whenever we want people to take action on something, we post a bulletin with a direct link to the action on our Web site. After our friends take action, they re-post the bulletin for their friends.

We just started a group for one of our campaigns, and plan to do the same for each campaign that we have. This is a great way to target people interested in and passionate about our specific issues, and communicate with them to take action.

Did you have any concerns before launching social network pages and if so, what were they?

We had resource concerns regarding care and feeding of the site and monitoring content presented under our organizational brand. For example, [we were concerned about] “adult” friends, divisive political issues, candidate messaging, and so on.

What advice would you give others who are thinking about using MySpace to advance their causes?

MySpace (or any other social network for that matter) isn’t for everyone. You need to look at your organization and decide if you have the time, resources, and interest – among other things – to really make it work. You can’t just create a profile and expect to have tons of friends come flocking to you. You need to be constantly active, promote yourself, and keep the dialogue conversational. Otherwise, people will get bored and just move on and the viral aspect of MySpace (telling friends, reposting bulletins, new friend requests) will die off. We have a whole strategy in place for MySpace; it’s not just something we thought to do overnight.

That being said, for us, MySpace has been a great way to build community and engage animal lovers to take action. It has also been a successful way to get our message out to a hard-to-reach demographic and get them to care.
Congratulations and Next Steps

Congratulations! If you’ve read this far you have demonstrated your commitment to improving your communications and generating broader support for your programs.

Our goal in writing this workbook and assembling the resources on the accompanying Resource CD is to provide you with a useful guide to the why’s and how-to’s of incorporating tech-savvy communications into your existing toolkit of resources.

To make the most of this toolkit,

- Do the hands-on “It’s Your Turn” exercises to create your own tech-savvy communications plan.
- Open the accompanying Resource CD to access customizable templates, and links to additional resources to learn more.
Resource List

Selected resources on communications and technology assistance for nonprofits.

1) Implementing Tech-Savvy Communications Channels
For links to articles and sites on implementing tech-savvy tactics, see the full Resource List on the toolkit Resource CD.

2) Communications
a. Do it yourself

Strategic Communication in the Digital Age, from the Benton Foundation. Begin with the planning section at http://www.benton.org/publibrary/practice/Toolkit/planning.html, and click through from there to Audience, Message Shaping, and Media Choices.

Communications Toolkit from Cause Communications. Available at http://www.causecommunications.org/CC/CC_news06_2.html, and a pdf copy of the workbook is provided on the Resource CD that is included in this toolkit.

The Spitfire Strategies Smart Chart, by Spitfire Strategies. Online version available at http://www.smartchart.org, and a print copy of the chart is provided on the Resource CD that is included in this toolkit. A tool to help nonprofits make smart communications choices.

Communications Plan template and sample plan, developed by the Kellog Foundation. Copies are provided on the Resource CD that is included in this toolkit.


Creating Passionate Users blog at http://headrush.typepad.com/creating_passionate_users/
Ideas on communicating with customers and users.

Designing a Communications Plan To Enhance Your Fundraising Campaign, from the Fund-Raising Forum Library by Tony Poderis at http://www.raisefunds.com/0401forum.html

The Nonprofit Communications Network at http://www.ncn-online.org/
A 501(c)3 membership organization aiming to be a resource for both veteran and new nonprofit professionals who seek to enhance the success of their organizations through more effective media relations, marketing, publications and web-based communications.

A how-to guide—a practical manual for nonprofit staff written in non-technical language, based on real-life experiences and case studies. Offers the opportunity to select the appropriate strategy to integrate traditional marketing, communications, and fundraising practices with online efforts.

Nonprofit Strategies: Communications plan helps your nonprofit, by Sally Little on bizwomen.com April 2006 at http://www.bizjournals.com/bizwomen/pacific/content/printed.html?story_id=1276363

Strategic Communications for Nonprofit Organizations: Seven Steps to Creating a Successful Plan (Wiley Nonprofit Law, Finance and Management Series, Paperback) by Janel M. Radtke.

Resource List

b. Communications service providers – a sampling of firms specializing in nonprofits

C. David Hopkins, Strategic Communications for Nonprofits.
At http://cdavidhopkins.com/

Conscious Communications delivers strategic, persuasive communications and marketing programs for socially responsible businesses, social ventures and select non-profit organizations. At http://www.consciouscomm.com/

Cruz Coleman Communications, an Internet strategies firm committed to helping organizations, socially responsible companies, and writers gain maximum visibility by promoting their products and causes on the Internet. At http://www.cruzcoleman.com/

Numa PR and Marketing services for nonprofits, schools and government agencies. At www.numapr.com

Pyramid Communications, a full-service public affairs firm dedicated to socially responsible causes. At http://pyramidcommunications.com/.

See3 helps nonprofits bring every-day activities to life through a combination of traditional and new media. Create products that use video, audio and high-quality digital photography in engaging and innovative ways for fundraising, education and general communication. At http://www.see3.net/see_model.html

3) Technology tips and how-to’s for nonprofits

Idealware
Candid Consumer-Reports-style reviews and articles about software of interest to nonprofits. http://www.idealware.org/

NetSquared
A project of TechSoup, NetSquared is helping nonprofits harness Web technologies for social change. http://learn.netsquared.org/

Nonprofit Technology Enterprise Network (N-TEN)
Provides regional technology conferences geared towards nonprofits, free tech tips newsletter, discussion lists and affinity groups. http://www.nten.org/

NPower (Seattle and NPower affiliates in 11 other cities in the U.S.)
Consulting services, training, toolkits (in addition to this toolkit, NPower Seattle offers toolkits on Donor Management Software Selection, and Using Free Online Tools). See the national NPower site at http://www.npower.org/ for a listing of all affiliates. The NPower Seattle site is at http://www.npowerseattle.org/

TechSoup
Technology resource aimed at nonprofit organizations, featuring discounts, discussions, and articles. http://www.techsoup.org/
Appendix

Summary of funder feedback
Tips for strengthening a funding request for technology

NPower Seattle retained a consultant in 2006 to conduct a study on the attitudes of institutional funders and potential major donors regarding support of technology needs for nonprofit providers with the focus on social service providers.

This study included in person and phone interviews with private foundation, community foundation and corporate giving officers. Four individuals with a history of supporting social services (all with gifts of $500 or more) were also surveyed regarding their attitudes and acceptance of requests for support of technology needs, both for hardware and software, from non-profits.

Process
A questionnaire was used to maintain a consistent base for all interviews. An actual case statement from a Tech-Savvy Communications partner organization was modified to make it a generic social service organization message. This generic statement was used as part of the interview process since it included all points that all five of the partner organizations involved in this project had to a greater or lesser extent. When this case statement was presented to the interviewee all mention of the specific organization had been removed to prevent any assumptions that could be made on the basis of past relationships between the donor or funder and the organization. Additional ideas and information offered by the interviewees were also pursued and is noted in this report.

All remarks listed are direct quotes from the interviewees. Because key points were made by more then one person it is noted how many time it was mentioned.

A total of eight interviews were completed.

Findings
It was found that the willingness of donors and funders to support technology requests corresponded closely to their own level of comfort and sophistication in the use of technology. While all groups and individuals have and use different versions of Windows (no Apple users were included), they modeled the “real world” in their ability to use more advanced technology in support of their own goals.

Consistently, from both donors and institutions was the request to connect support of the mission to the request for support. Listed below are key responses to this number one priority:

- Bring need back to mission and service to the clients. (8)
- Why the need for better access within the organization to new technology? (5)
- How will the technology improve service and the measurement of outcomes? (4)
- How will this technology further the organizations mission? (5)
Appendix

Within the request for support the following information was noted about what donors and funders expect to see:

- Highlight the current complexities and challenges for reporting requirements to funders. (3)
- How was the proposed technology plan developed? (3)
- How the proposed plan or request developed? (3)
- Were the proposed organizational users included in the planning process? (2)
- What is the proposed conversion and training plan for users? (2)
- How will the organization maintain the system once it is installed? (2)
- How will the organization manage and sustain the new/upgraded system once it is up and running? (2)
- Need to define the technology need within the lens of value to the client and the ability for the organization to expand client programs based on this technology.
- The organization should include a technology plan (like a business plan) with their request.

Additionally – it was noted when asked what individual donors need to see in a request all the above points were included. Also - the observation of asking the donor if they could function within their own life without access to the internet and skills needed for basic computer activities on the job and in their private life would help provide context for any request for support.

Some funders and all of the individual donors were unaware of the fact that all appointments with the Immigration Department now need to be done on-line. This indicates a need for education of how such programs are critical to the success of immigrants in our community.

Editor's note: Online appointments is a specific example drawn from the Using Free Online Tools toolkit, and was offered as a talking point in the survey to illustrate the importance of technology fluency.

Recommendations

Any requests for support for acquisition and/or upgrade of technology should be driven by support of the organization’s mission. Attention should be paid to providing specific goals that will be achieved with the addition of the new technology. The organization’s case should include reference to how technology supports these outcomes.

All requests should include a section on how the organization can support the technology on an on-going basis including plans to support regular system upgrades. This may include the creation of a job position (full or part time), or through a contract to support the system on a regular basis.

Information regarding training of staff and implementation timelines will also strengthen the request for support.

While there is openness in the community to support technology requests there is a strong expectation that the organizations will understand the need to approach the planning and management of these systems in a business like manner. This approach will need to be included in all materials submitted. If the information contained in this report is incorporated into the planning and solicitation process an overall successful outcome should result.