Module 1 – Communications – Part 2
Communications Planning

Facilitator Guide

NOTES

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Facilitator Guide

I. Purpose of the Facilitator's Guide

The facilitator's guide is designed to assist facilitators to deliver the workshop as an introduction to communications planning and to use the guide to develop a workshop to assist community groups to improve their communications plan or develop a communications plan or strategy.

The guide is supplemented by PowerPoint slides which can be used for the workshop or modified to meet the requirements of your participants. The workshop exercises are provided to encourage group discussion and interaction and depending on your participants and time can be modified. Notes to facilitators are contained in the exercises and throughout the guide marked with a bullet ►.

II. Facilitating the Workshop

a. Facilitator Profile

Effective facilitation of this workshop will require:

- Skills in group facilitation
- Knowledge of adult education principles
- Understanding of regional economic development boards, municipal and other levels of government
- Understanding of community economic development
- Knowledge of communication planning

b. Participant Profile

Participants of this workshop will be a diverse group of individuals who may come from a variety of backgrounds and represent a variety of groups or organizations. They will bring to the group a wide range of attributes, knowledge, skills and experiences.

c. Pre-Session Planning

A pre-session questionnaire or a meeting with participants is useful to assist you with developing the agenda. In some instances, the facilitator will meet with one or two key people in the organization to discuss the participants' requirements from the session

Note: A sample pre-session questionnaire is provided in the Facilitator's Tool kit

i. Methodology

Activities to support the various topics are contained in the facilitator and participant guide. The activities or exercises have the following:

- ✓ Suggested time lines
- ✓ Objectives
- ✓ Advance preparation
- ✓ Exercise
- ✓ Notes to facilitator
- ✓ Facilitator resources
- ✓ Participant resources

Depending on the size of the workshop, small groups should consist of 4-7 participants. Switching the membership of the small groups provides individuals with the opportunity to hear fresh perspectives and to create the opportunity for participants to expand their network.

While the method for each activity is prescribed, it is recommended that the facilitator determine the best approach for each activity. The time lines suggested are for guidance only as the exercises may take less or more time. You can adjust according to your time and your participants. The key is to facilitate a process of empowering and assisting participants to achieve established objectives.

ii. Pre -Workshop Questionnaire

The facilitator should try to identify the specific learning needs of each group in order to customize the structure and content of the workshop so that it will respond to the participants' needs. Types of information and questions that will assist you in designing each workshop includes but may not be limited to:

- Individual information (i.e. their name, where they work and/or volunteer, relevant reporting relationships with others who may be attending, the composition of their work/volunteer group, special needs etc.)
- Past community development experience
- Knowledge of past, present and/or future community development initiatives which they were/are/ may be involved
- Background information on vision, mission, goals and activities of their community development efforts
- A list of priority expectations

You can obtain this information in a variety of ways, such as:

1. Arrange a meeting with a representative of the participant group ahead of time. This is usually the most effective and efficient way to obtain information.

2. Develop a "pre-workshop questionnaire" which provides participants with an opportunity to identify their specific interests and expectations. A sample questionnaire is provided in the Facilitator's Toolkit.

3. Develop a draft outline of your planned approach to the workshop and send it to the participants via fax, e-mail or snail mail. Ask them to provide feedback on the agenda and the learning objectives. A sample letter is provided in the Facilitator's Toolkit. You may consider incorporating additional information in this correspondence which you will need to send out to the participants.

iii. Developing/Customizing Agenda

The needs and interests of the participants and the time available will determine the topics that will be explored in the workshop. You will develop your workshop agenda based on your pre-session planning (questionnaire, interviews, meetings) but the agenda should include the following:

- Objective of the session
- An introduction
- Establishing ground rules
- A review of the key learning objectives
- Topic overviews and activities
- Identification and discussion of issues, concerns and challenges
- A conclusion consisting of a review of expectations and completion of the workshop evaluation

iv. Materials/Supplies/Equipment

The following supplies will be required:

- ☐ flip chart stand(s) and paper
- ☐ markers, pens and pencils
- ☐ masking tape
- ☐ paper for participants
- ☐ Post-it notes or stickers for exercises

- ☐ copies of any handouts to be used
- ☐ folders and/or small binders for participant's tools

If you opt to use an overhead projector and laptop then you will need the following:

- ☐ Overhead projector
- ☐ Extra bulb for the projector
- ☐ Laptop
- ☐ Extension Cords
- ☐ Copies of overheads for participants
- ☐ Screen
- ☐ Power Bar
- ☐ Discs

Caution: Always develop a Plan B when using technology

v. Logistics

The workshop space should be comfortable as you will be spending a full day in the room. The lighting, seating, temperature, location of washrooms, availability of water or coffee, all contribute to the success of your session. Participants should be advised in advance if food will be provided during nutritional breaks or lunch. Ensure that you accommodate any special needs of your participants.

If you are not familiar with the allocated workshop space, arrange to visit it prior to the session or discuss your requirements with a representative of the organization or the facility you will be using.

This workshop has been designed to accommodate 12 to 16 participants. You will need a large room that will accommodate a U-shaped seating arrangement which will encourage group participation. To support the small group discussions which will be taking place, break out rooms/sufficient space will be needed.

Suggested resources for participants to review prior to the session include:

vi. Housekeeping

At the beginning of the session, it is important that you address all housekeeping items. These may include but are not limited to:

- ➢ Advise participants that they will receive handouts
- ➢ Length of workshop
- ➢ Nutrition and lunch break times
- ➢ Location of the water cooler, kettle, coffee pot, washrooms, available telephone etc.

- Use of cell phones
- How messages will be handled
- Contact number
- Emergency exit

vii. Guidelines

Advise participants that you will be using a **Parking Lot** tool which is a space for questions, comments and issues that arise during the session that are not covered in the agenda or require additional material. The parking lot will be addressed at the end of the session.

Another facilitation technique that some find useful is to assign a **Timekeeper** so that the agreed upon time lines in the agenda are followed by the facilitator. The timekeeper is responsible for advising the group when the allocated time for a topic is up. Using a timekeeper allows the group to take a collective responsibility for the effective use of time throughout the session.

Establishing **Ground Rules** is a useful strategy to get the group to identify actions and behaviours that are to be followed during the session. For instance, a common Ground rule is that the group sticks to allocated times unless everyone agrees; that you address the issue and not the person; one person speaks at a time; no interruption, etc. The group decisions on ground rules provide a positive environment for the facilitator and the participants who have contributed to the rules for the session.

III. Post-session Work

The post-session work involves addressing any issues that arise from the parking lot or arranging for some follow up to address any issues. The participants are responsible for evaluating the workshop and the facilitator so an evaluation form is to be provided for each participant. A member of the group should collect the completed forms and provide them to the organization and they will then be later forwarded to the facilitator.

The facilitator should also prepare a list of lessons learned throughout the session – what worked, what needs improvement, what could change – recognizing of course that the participants and their expectations may change with the next session.

NOTES

Communications Module 1 – Part 2 - Communications Planning

The workshop is a full-day session to introduce participants to communications planning. It is the second day of the two-day Communications Skills workshop.

AGENDA

Activity	**Time***
Icebreaker	5 minutes
Welcome & Overview	5 minutes
Agenda Review	5 minutes
Why Communicate	30 minutes
Communication strategies	20 minutes
Types of Media	20 minutes
What to Communicate	30 minutes
Target Audience	30 minutes
Communication/Delivery Methods	30 minutes
Establish a Communications Plan	60 minutes
Monitor and Evaluate Communications Plan	30 minutes
Parking Lot	30 minutes
Discussion/Evaluation	30 minutes

*suggested times only - can be modified to meet needs

NOTES

Learning Objectives

The learning objectives for the Communications Planning module include:

- Understand various communication terms
- Identify various types of media and how to use them
- Discuss various target audiences and how to reach them
- Identify the various ways your organization can communicate with its target audience
- Determine the types of information your organization should communicate
- Discuss techniques for dealing with the media

Getting Started

- **Icebreaker**

  Select an icebreaker from the facilitator's guide or one of your own choices that is suitable for your group and its size.

- **Agenda Review**

  Review the agenda with participants that you have prepared on flipchart. Discuss any changes to the content or timelines.

  Some groups or facilitators may wish to assign times for the various sections, for breaks and for lunch.

  Review ground rules

  Assign time keeper

  Discuss parking lot

- Review and Discuss

NOTES

1.0 The communications planning process

Communicating with your community, your volunteers, staff, and stakeholders is important to the success of your organization. In our last session, we focused on interpersonal communication skills becoming an effective communicator. In this session we will discuss the importance of communicating as an organization.

During the Communications Planning session we will discuss the following and participate in a variety of activities and discussions to help you and your organization communicate more effectively with stakeholders.

- Why communicate as an organization?
- Communication strategies
- Media
- Target audience
- Communication/Delivery Methods
- Communications Plan
- Monitor and Evaluate Communications Plan
- Tailor message to audience

➢ **Complete Exercise 1**

NOTES

Exercise 1 – Why we communicate

Suggested time: 15 minutes

Objective

Discuss various reasons for your organization to communicate

Advance preparation

None

Exercise

To open discussion on why we communicate, use a brainstorming session to get participants to list some reasons they communicate in their organization or municipality.

> **Note to facilitator**
>
> Prepare flipchart page for exercise – why we communicate.
>
> The exercise could also be completed individually to give participants time to reflect on their organizations' reasons for communicating. Responses could then be generated from their lists and recorded on flipchart.   Allow more time if you chose this method.

Facilitator resources: Flipchart

Participant resources: Participant handbook

Review/Discuss

Review and discuss results from the introductory exercise about why your organization needs to communicate. Discuss the following as required:

NOTES

2.0 Why communicate as an organization?

Your organization, association, or municipality needs to communicate for a variety of reasons – legislative requirements, inform the community and stakeholders, promote successes, and generate community support.

2.1 Funding Requirement

Funding agencies such as Atlantic Canada Opportunities Agency (ACOA) and other government departments often provide initial media release to promote their contribution to a project. The agency or department will often outline requirements for further promotion –such as use of logo – throughout the project.

The business community and private foundations also have requirements for recognition of their contribution.

2.2 Legislative requirement

Municipalities, regional economic development boards, have a requirement to inform the public through public meetings, public minutes, annual meetings, consultations and other strategies.

2.3 Due diligence (by-laws)

- Board bylaws usually require public meeting
- Advise public about regular, special and annual meetings, or to publish annual reports, etc.
- Requirement to publicize financial information

2.4 Change behaviour and/or attitudes

An organization, association or municipality may require a communications strategy to change the behaviour or attitudes of internal or stakeholders. For instance, a volunteer organization involved in promoting a healthy lifestyle may engage in a communications plan with high school students to reduce smoking or eating junk food.

2.5 Build community support

Community support is necessary for continued success of an organization. In a municipality community support for initiatives and projects is critical for smooth operation of the town, and an organization needs support of stakeholders in order to continue to meet its goals and objectives.

2.6 Raise awareness

- Raise awareness about the organization and its work
- Assist to build community support for any projects or initiatives

2.7 Exchange information

- Communicate to share information
- Liaise with partners involved in mandate and projects

2.8 Crisis/risk management

- Providing information in a timely manner during a crisis or emergency is critical for your organization and stakeholders
- Ensure your organization has a spokesperson to speak in a crisis or emergency

2.9 Build capacity

Maintaining communications with your stakeholders can contribute to building community capacity. Building capacity places emphasis on existing resources and that the community is interested in participating in its development and growth.

2.10 Advocacy

Advocacy may be an important activity for many organizations and can help an organization raise and maintain a public profile. For instance, a group may engage regular advocacy to preserve an open space for future development.

- Incorporate advocacy as part of an overall communications plan
- Ensure that your organization's mandate includes advocacy

2.11 Improve volunteer and staff morale

Acknowledge and publicly recognize efforts of volunteers and staff to contribute to maintaining a positive workshop relationship.

2.12 Recognize achievements/accomplishments

Publicly acknowledging achievement and accomplishments of staff, board members and the board will help you achieve many of the reasons we have already discussed.

➢ **Complete Exercise 2 – Next Page**

NOTES

Exercise 2 - Review some communication strategies

Suggested time: 10 minutes

Objective

Identify various terms used by organizations to identify their promotional activities.

Exercise

List the terms public relations, marketing and advertising on flipchart and ask participants to brainstorm some of the components of each.

> **Note to facilitator**
>
> Prepare three flipchart pages with the three terms and ask participants to generate list of what activities go in each category. This exercise is to get participants thinking about what types of communication activities they are involved in and how they perceive them, or if they see that there is a difference in the various terms.

If the group is small you can get participants to get up and write their own suggestions under each category. If necessary, review the additional material on public relations, marketing and advertising (Additional Material #1)

Facilitator resources: Handout: Additional material on public relations, marketing and advertising.

Participant resources: Handout: Additional material on public relations, marketing and advertising

- **Summarize discussion from Exercise 2**

- **Review communication strategies**

NOTES

3.0 Communication strategies

It is easy to become confused about the various terms used by businesses, organizations and municipalities to describe their communications activities. Terms such as public relations, marketing, advertising and promotion can be found in different organizations and incorporate the entire range of activities and media. The terminology will often depend on the size of the organization and its mandate. Whatever term is used, an organization should have some sort of a plan to communicate and regularly evaluate it.

The following are communication terms used to describe the range of communication activities.

3.1 Marketing

- Overall plan to promote your organization using variety of media and tools
- Usually a comprehensive plan which focuses on all aspects of promoting your organization

3.2 Advertising

- Involves bringing a product/service to the attention of customers
- Focuses on one particular product or service.
- Uses signs, brochures, commercials, direct mailings or e-mail messages, personal contact, etc.
- Includes sponsorship of events, tradeshows, projects
- Media charges for advertising

3.3 Public relations

- Ongoing activities to ensure the organization has a strong public image.
- Includes activities include helping the public to understand the organization and its services
- can be conducted through media or through presence at events

3.4 Promotion

- Ongoing advertising and public relations
- Creating a familiarity with a product or service to create demand

Refer to Additional Material # 1

Additional Material # 1

Advertising, Marketing, Promotion, Public Relations and Publicity, and Sales

It's easy to become confused about these terms: advertising, marketing, promotion, public relations and publicity, and sales. The terms are often used interchangeably. However, they refer to different -- but similar activities. Some basic definitions are provided below. A short example is also provided hopefully to help make the terms more clear to the reader.

Advertising
Advertising is bringing a product (or service) to the attention of potential and current customers. Advertising is focused on one particular product or service. Thus, an advertising plan for one product might be very different than that for another product. Advertising is typically done with signs, brochures, commercials, direct mailings or e-mail messages, personal contact, etc.

Promotion
Promotion keeps the product in the minds of the customer and helps stimulate demand for the product. Promotion involves ongoing advertising and publicity, such as mention in the media. The ongoing activities of advertising, sales and public relations are often considered aspects of promotions.

Marketing
Marketing is the wide range of activities involved in making sure that you're continuing to meet the needs of your customers and getting value in return. Marketing is usually focused on one product or service. Thus, a marketing plan for one product might be very different than that for another product. Marketing activities include "inbound marketing," such as market research to find out, for example, what groups of potential customers exist, what their needs are, which of those needs you can meet, how you should meet them, etc. Inbound marketing also includes analyzing the competition, positioning your new product or service (finding your market niche), and pricing your products and services. "Outbound marketing" includes promoting a product through continued advertising, promotions, public relations and sales.

Public relations
Public relations includes ongoing activities to ensure the organization or company has a strong public image. Public relations activities include helping the public to understand the organization or company and its services or products. Often, public relations are conducted through the media, that is, newspapers, television, magazines, etc. As noted above, public relations is often considered as one of the primary activities included in promotions.

Publicity
Publicity is mention in the media. Organizations usually have little control over the message in the media, at least, not as they do in advertising. Regarding publicity, reporters and writers decide what will be said.

Sales
Sales involves most or many of the following activities, including cultivating prospective buyers (or leads) in a market segment; conveying the features, advantages and benefits of a product or service to the lead; and closing the sale (or coming to agreement on pricing and services). A sales plan for one product might be very different than that for another product.

An Example of the Definitions
The following example may help to make the above five concepts more clear. I recently read that the story comes from the *Reader's Digest*, a quote found in "Promoting Issues and Ideas" by M. Booth and Associates, Inc. (Thanks to Jennifer M. Seher, participant in the CONSULTANTS@CHARITYCHANNEL.COM online discussion group.)
"... if the circus is coming to town and you paint a sign saying 'Circus Coming to the Fairground Saturday', that's **advertising**. If you put the sign on the back of an elephant and walk it into town, that's **promotion**. If the elephant walks through the mayor's flower bed, that's **publicity**. And if you get the mayor to laugh about it, that's **public relations**." If the town's citizens go the circus, you show them the many entertainment booths, explain how much fun they'll have spending money at the booths, answer their questions and ultimately, they spend a lot at the circus, that's **sales**.

Adopted from Basic Definitions of Advertising, Marketing, Promotion, Public Relations and Publicity, and Sales by Carter McNamara, MBA, PhD
Source: www.managementhelp.org

Exercise 3 – Media or distribution channels used to communicate

Suggested time: 10 minutes

Objective

Develop an understanding of the various types of media channels and how to use them

Advance preparation

None

Exercise

Ask participants to identify the various types of media that they use to communicate to their stakeholders and record on flipchart.

Option 2: Instead of reviewing the slides and discussing each method, you can use/extend this exercise by discussing the following:

- Advantages and disadvantages of each
- Ones most successful in their community and for their organization
- Whether the organization has a list of various media, community newsletters, etc

Note to facilitator: Prepare flipchart page with heading media channels so that you can list the responses.

Facilitator resources: Flipchart

Participant resources

- **Review Exercise 3**
- **Discuss (if not discussed at length in exercise 3)**

NOTES

4.0 Media (distribution channels)

Your medium or channel of communication is referred to as the media. The media includes a variety of print and electronic media and are outlined below:

4.1 Newspaper

- Ideal for reaching a specific audience
- Make space available for community events
- Determine editorial policies

4.2 Radio

- Immediate
- Reaches many audiences
- Regular news and features
- Excellent tool for public service announcements

4.3 Television

- Community cable channels provide wide access to community
- Primary focus is major events due to nature of medium
- Challenge for groups and organizations to make the news

4.4 Magazines

- Directed at target audiences
- Need to determine editorial policies

4.5 Industry/community publications

- Directed at target audience
- Some provide space for community groups
- Can be excellent channel to reach some target audiences

➢ **Complete Exercise 4 (next page)**

NOTES

Exercise 4 - What does your organization communicate?

Suggested time: 15 minutes

Objective

To demonstrate an understanding of appropriate information that an organization need to communicate to their stakeholders.

Advance preparation

None

Exercise

Ask participants to think about what should be communicated by their organization.

Record on flipchart and identify those that are similar to those listed in workshop material.

Note to facilitator

Some of the items may be similar to those identified in 2.0. The difference is that 2.0 talked about "why" and this section discusses "what."

Facilitator resources

Participant resources

- **Review Exercise 4**
- **Discuss**

Note:

- there may be some duplication here from 2.0 so can review the section or highlight some sections for further emphasis
- encourage participants to generate items for 5.4 onward to illustrate that there are no right answers to some of these items – that communication practices are often an individual organization's choice.

5.0 What to communicate

What should an organization communicate to the public? There are certain standard things that should be communicated such as good news about funding or staff. For some groups, what they communicate to the public may be related to a special project or to their mandate.

5.1 Good news

- Organization accomplishments
- Staff achievements
- Funding
- Awards

5.2 Best practices

- Promote successful projects that address a community
- Provides examples for other communities

5.3 Mission / mandate

- Promote what you are established to do
- Promote any changes or updates to the mission and mandate

5.4 Progress reports and achievements

- Progress or interim on community projects
- Achievement of milestones, new programs

5.5 New initiatives

- New community program or service
- New way of doing business to improve service

5.6 Changes

- Changes designed to improve business processes
- Changes as a result of funding

5.7 Policy and opinions

- Board or municipality's new policies
- Board or municipality's position on government or other policies

- Opinions on community or government initiatives that could impact programs or services

5.8 Basic information and facts

- Community or regional socio-economic profiles
- Board information

5.9 Events

- Special events
- Regular events

5.10 Research

- Results of research
- Impact of research results from another organization

➢ **Discuss**

6.0 Target audiences

A **target audience** is the primary group of people that can be of a certain age group, gender, marital status, income bracket, or some other characteristic. A certain combination, like community volunteers age 24 and up is a target audience, as are employees and elected officials of a government department or agency. Determining a target audience is one of the most important stages involved with market research. Without knowing your target audience promoting a product or service can become difficult and very expensive.

The target audiences that are relevant to community groups and organizations are varied and can include the following groups.

6.1 Internal organization

- Staff
    - May be a small or large target group depending on size or organization
    - Ensure internal/staff communication channel
- Volunteers/Board members
    - May be in the community or geographically dispersed
    - Maintain regular communication with volunteers to sustain commitment
- Committees
    - May be in community or geographically dispersed
    - Maintain regular communication as required
    -

6.2 External Organizations

- Funding sources
    - Government departments and agencies
    - Municipalities

        - Private foundations
        - Business community
    - Partners
        - Government departments
        - College
        - Schools
        - Service clubs
        - Volunteer community

- Elected Officials
    - Federal representatives
    - Provincial representatives
    - Municipal representatives
    - School board
- Other stakeholders
    - Public
    - Media

6.3 Tailor message to audience

Once you know and understand your target audience it is important to develop the message with the appropriate language so that you appeal to the audience.

For instance, if you are holding a public meeting to generate interest in several committees that you wish to establish in your community, identify the people you wish to target (age, experience, knowledge) and determine the best method of reaching them. This can be general publications like newspapers, but also try church bulletins, school newsletters, direct letters, or radio and cable television public service announcements.

It is very important to ensure that you include statements to motivate people to respond, and not just a general call for volunteers. Ensure that you state the commitment that will be required, the type of work that will be required, and other pertinent information.

- **Complete Exercise 5 (next page)**

NOTES

Exercise 5 – Who is your target audience?

Suggested time: 30 minutes

Objective

Identify the various target audiences that are relevant to your organization.

Advance preparation

Briefly review Section 6.0 – Target Audiences

Exercise

Place participants in groups of four or five and provide them with the case studies. The groups are to identify the target audience for communicating the project or program.

> **Note to facilitator**
>
> This exercise requires space for small group discussion so ensure that the room can facilitate this or additional rooms are available. The exercise will be the basis for a further exercise to develop a communications strategy for the project or program.
>
> Assign one or two groups with one case study. Advise them to review it and generate the list of people they consider to be the target audience. The group selects a recorder and reporter.
>
> NOTE: This exercise is used again for Exercise 7 when they will identify communication methods to reach the target audience.

Facilitator resources: Pen and Paper, Flipchart paper

Participant resources: Pen, paper, flipchart paper for recording target audience**.**

NOTES

Exercise 5 - Case studies

1. Regional Economic Development Board

Directions: In your groups, identify the target audience for any communications strategies or projects describing this project**.**

Regional economic development board just received funding from ACOA and Industry Canada to develop a comprehensive community profile. Two new staff members will be hired to complete the project in the region.

2. The Town of Tildacane

Directions: A committee has been formed to begin planning the project. Generate a list of stakeholders.

The Town of Tildacane just announced that it is embarking on a plan to construct a new multi-purpose facility for the Town to replace several buildings, including the town hall, swimming pool, stadium and public works depot. A committee has been formed to begin planning the project.

3. The Coffee Makers Co-op

Directions: The Co-op needs to update its list of potential customers and other stakeholders so generate a target audience list.

The Coffee Makers Co-op has developed a new low caffeine bold tasting coffee which will appeal to coffee lovers who are conscious about caffeine levels. Not all members are totally supportive because it means buying imported coffee but are willing to support the development of the new product.

4. The Middle Ridge Farmers Market

Directions: Generate a target audience list for promotion of the committee opportunity.

The Middle Ridge Farmers Market which sells fresh fruit, vegetables, quality crafts and some processed foods like jams and pickles, is looking for volunteers to sit on two new committees – a product development committee and marketing committee. The market board has already had a general call for volunteers through requests in the community paper's what's happening section, but hasn't had any takers

- **Discuss**

7.0 Communication Methods/Delivery Methods

Once you understand your target audience you can pay attention to the ways in which you are going to reach your audience. The types of communication methods you use will depend on the target audience, but some, such as branding, is critical as a first step for any organization.

7.1 Branding

This is the first step in development of communications plan

- Determine how you wish to promote our organization – eg. name, tag line, logo, and other information
- Includes letterhead, website, brochure, signage, and other promotional material
- Ensure that it is used the same way in all materials to deliver main message in consistent manner

7.2 News release

The news release is written and circulated to all media when you have an important announcement. You may also send a news release to a specific media if you are trying to reach a certain target audience. For example, if you wish to recruit volunteers for a health related forum you may contact hospitals and nursing homes and have the information contained in their newsletters.

Components of a news release:

1. Write an interesting title
2. Answer the 5W's and how
3. Keep it short – one or two pages if necessary
4. Put most important information first
5. Send additional information and photos (with cutline/caption)

6. Include contact name and telephone number and ensure person is available to media when release sent out

7.3 Public Service Announcement

- A short description of an event or service delivered in a 10 to 60-second radio clip
- A one paragraph description of an event for a print publication
- Media usually make space available for community events

7.4 Brochure

A brochure is a folded information sheet containing basic information on your organization. It can be created inhouse using a variety of graphics and photos, or can be professionally created... The production will depend on your budget and audience. Think about the distribution when developing your brochure – how will it reach your audience?

Your organization should have developed its brand and identified audiences in its communications plan, so the brochure can be designed to reach a specific audience or a general one to promote awareness of your organization.

7.5 Display

A display can be a table top board to a large scale trade show backdrop. Depending on your organization's mandate and budget, a display can be used for a variety of promotional activities – high school events, local trade fairs, college open houses, industry events, trade shows – and the message can be consistent or tailored to the specific audience.

7.6 Speeches and presentations

Staff and officials of community-based organizations are often called upon to make presentations to various government and community events. If your organization is not well known and does not get such requests, it is worthwhile to contact various groups and offer to be a guest speaker or make a presentation.

- Prepare a standard speech with the organization’s key messages
- Prepare a stand PowerPoint presentation which can be modified as needed
- Take the display for speeches and presentations

7.7 Newsletters and circulars

Producing a newsletter can be an effective tool to keep your stakeholders and the public updated on your activities and updates. A newsletter can be a one page sheet with highlights or can be an 8 or more page booklet.

If you are going to produce a newsletter, determine budget, human resources, circulation, and frequency.

7.8 General correspondence

Letters to community leaders, local businesses, and government officials can provide a forum for sharing information or promoting your organization. A letter can be sent to announce a major initiative, to introduce your organization’s brochure, or to accompany a progress or annual report.

Letters have an excellent chance of being read and tabled by government and volunteer organizations.

7.9 Technology

Use websites, email and other technology for communicating with the public. Maintaining an updated current website is a major challenge for many organizations so assess your site and if necessary, make it a location for basic information only which does not require frequent updating. You can use email to notify stakeholders of important meetings and events.

7.10 Minutes

Posting minutes on your website is a good way to communicate your organizations discussions and decisions.

Circulating minutes through email can also provide a link to stakeholders.

7.11 Reports

Reports can be lengthy documents so prepare an executive summary or similar summary of any report that you wish to circulate to your audience. The report can be made available online to be read by those who wish further information.

7.12 Sponsorships

Many organizations have sponsors for certain events – eg the local utility company is sponsoring a youth forum – so these contributions need to be acknowledged and recognized in any marketing for that event.

7.13 Consultations

A community consultation process may be incorporated into a communications plan in order to get input and feedback from various groups on an annual basis. Stakeholders such as government departments, agencies, community groups, schools, and others may be included and methods may include presentations, public meetings, speeches, and networking events.

- **Refer to additional material**
- **Complete exercise 6**

NOTES

Additional Material #3

Writing a Media Release

What is a media release?

A media release (also sometimes called a press or news release) is information that you wish released to the media pertaining to a specific issue or event that affects your group or organization. The media consists of newspapers, radio stations and television stations, but may also include magazines and online publications. Depending on the range of interest for your story, you may wish to contact local, provincial, national and/or international media.

Why write a media release?

Here are a few examples of reasons why a group or organization might issue a media release:

- Publicizing an opinion
- Winning an award
- Receiving or losing funding
- Launching a new program
- Achieving a goal
- Celebrating a milestone or anniversary
- Holding a fundraising event
- Anything else of interest

The purpose of a release is to connect with the media so that they will provide coverage of your story. However, there is no guarantee the media will “pick up” your story and provide coverage. It is up to each newspaper or station what stories they want to publish or broadcast. In most cases, the media release you send will not be used by the media “as is.” Rather, if the media is interested in your story, they will have a reporter contact you for more information so they can write the story themselves. So it is important to have a contact person who is very knowledgeable of the issue and the organization.

How to format and write a media release?

1. **Letterhead.** Use your organization’s letterhead (if applicable)

2. **Font and layout.** Make sure your font choice and size is plain and easily readable by fax – Times New Roman or Arial in a 12 or 14 point size are good choices. Double space if necessary.

3. **Media Release.** The words MEDIA RELEASE should be at the top of your release, in uppercase letters.

4. **Timing.** Indicate the release timing. In most cases, use FOR IMMEDIATE RELEASE, if the information can be released right away. Otherwise, use HOLD FOR RELEASE UNTIL ______ (indicate date and time) although this request may not always be honoured.

5. **Target.** List the target of your story. For example ATTENTION EDITOR or ATTENTION SPORTS EDITOR or ATTENTION ARTS EDITOR, depending on the subject.

6. **Headline.** List your headline. Print in uppercase letters. Your headline is what makes your release stand out and is the most important point you want to get across. Keep it active, descriptive, and try always to include the name of your organization. Example "BLOOMFIELD RECREATION COMMITTEE RECEIVES GRANT TO BUILD SKATE-BOARDING PARK" instead of "Bloomfield Recreation Committee receives $500 grant"

7. **Sub-headline.** List your sub-headline (if applicable). For example, "$500 grant will go a long-way to helping local youth"

8. **Date and Location.** Enter the date and location in brackets at the beginning of your first paragraph. For example, (May 4, 2002 – Bloomfield). If you are sending your release to national media, be sure to include your province.

9. **First paragraph.** This is where you clearly introduce the issue or event that you are sending the release about and how it relates to your organization. It is the hook that entices the media to read the rest of your release. This is also the best place to cover the 5 W's: WHO, WHAT, WHEN, WHERE, and WHY IMPORTANT.

10. **Second paragraph.** Includes a further description of your story, perhaps in the form of a quote from someone of significance. This will increase the interest of the reader since someone else besides you has input about your story.

11. **Subsequent paragraphs.** Includes less important and supporting information.

12. **–more- line.** If the release is more than one page put "-more-" at the bottom of the page.

13. **–30- line.** This indicates the end of the media release. Everything listed above the -30- line is considered suitable for release to the public.

14. **Contact information.** This lists the contact person and how the media can get in touch with them for more information. Include a name, title, telephone numbers, and email address as a minimum. Make sure that there is always someone who the media can easily and quickly reach for follow-up. News happens very quickly - if a reporter cannot reach someone when they need to, your story might be dropped and your credibility may be affected.

15. **About your organization.** This is where you can briefly describe your organization and what it does (optional).

16. **Picture.** An interesting photo can sometimes increase the chance that the media release will be picked up. If you do send a picture, include a caption with picture details and photo credits.

17. **Proof read.** Proofread your release for accuracy and typographical errors. Give it to someone else to double-check it for you. This is going out to the public and you want it to be perfect. It is very important to have no mistakes.

How to send it?

By fax – A reminder to make sure your font choice and size is plain and easily readable by fax – Times New Roman or Arial in a 12 or 14 point size are good choices. Don't forget to include a cover page.

By e-mail – If using this method of distribution, send your release in the email message itself, not as an attachment, in a plain text format. Type MEDIA RELEASE in your subject line.

By mail – This method is not preferable unless you have no other option available to you, as it usually hinders distributing the release in a timely fashion.

When to send it?

Most media releases should be sent at the time the story, or event, is taking place. If you send it too early, there may not be enough for the media to write about. If you send it too late, the media may not want to cover something they feel is out-of-date. For example, if you are having a fundraising event on Saturday, send a media release with information about what happened at the event on Saturday evening or Sunday. If you wish to invite the media to attend an event in person, send a brief media advisory a day or two in advance listing just the WHO, WHAT, WHEN, WHERE.

What else you can do to get the attention of the media?

Following up on your media release with a phone call is sometimes worthwhile – ask them if they have received your release and remind them that you are available if they wish to follow-up with you. Always thank the media for their time and consideration.

While following these guidelines and applying creativity to your media release may help increase its chances, there is still no guarantee the media will cover your story. Some stories, no matter how wonderful or important to your organization, will appear dull to anyone not intimately involved with your organization. Don't send releases to the media in such cases. You don't want to damage the credibility of your organization with the media by sending boring stories – or they might start to ignore everything you send because you have developed a reputation for never sending them anything interesting.

Remember that every time you interact with the media you are building a relationship – even if they don't pick up your first story, hopefully you will have made a valuable contact and have improved your chances for the next time!

Source: Adopted from Writing a Media Release, Community Services Council of NL, www.envision.ca

NOTES

Additional Material #4

News Release Template

Title	Make it catchy – needs to grab attention
For Immediate Release Date	Today's date or when it should be released
Lead	Opening paragraph Who, what, when, where, why, how Preferably one sentence and less than 30 words
Main Body	Remainder of the body text Include any relevant information to support lead Include quote from spokesperson Less relevant information at the end Summarize in last line
Completion	-30- indicates release is finished
Contact	List spokesperson and contact information

NOTES

Additional Material #5

Quick Tips for Writing an Effective Media Release

1. **Use an imaginative headline that will grab the media's attention.**

   Your headline is what makes your release stand out. Keep it active, descriptive, and try always to include the name of your organization.
   Example: "BLOOMFIELD RECREATION COMMITTEE RECEIVES GRANT TO BUILD SKATE-BOARDING PARK" instead of "Local group receives $500 grant"

2. **List the most important information at the beginning.**

   The media should be able to learn what the release is about in the first paragraph – otherwise they may not read any further!

3. **Avoid hype and unsubstantiated claims.**

   Stick to the true facts and provide specific information – don't exaggerate the worthiness of the story. Also, don't let it sound like an advertisement - find creative but legitimate ways to highlight how the information pertains to your organization.

4. **Stress the benefits.**

   How will people's lives be helped by this news? For example, stress how the money raised will be used when releasing information about a fundraising event.

5. **Be active and to the point.**

   Use clear language that will get the reader as excited about the news as you are.

6. **Keep your release to one or two pages.**

   The media does not have the time nor the inclination to read a long release. The goal of the media release is to capture the interest of the media so they will contact you for more in-depth information.

7. **Keep your language simple.**

   Avoid using acronyms, abbreviations, or technical language that may not be understood by everyone.

8. **Be specific and detailed.**

   Ensure your release covers the 5 W's: WHO, WHAT, WHEN, WHERE, and WHY IMPORTANT.

9. **Include a contact.**

   Ensure that your release has a contact person listed for more information. This person should be familiar with the story and ready to answer questions. List all the ways this person can be contacted (office, home and cell numbers, email etc.)

10. **Proofread.**

    Proofread your release for accuracy and typographical errors. Give it to someone else to double-check it for you.

Source: www.envision.ca

Additional Material #6

GUIDELINES FOR WRITING A PUBLIC SERVICE ANNOUNCEMENT (PSA)

What is a PSA?
Unlike a media release, a public service announcement, or PSA, is usually transmitted electronically, via radio or television in a short spot of ten to sixty seconds. Stations donate a certain amount of airtime to serve the public and the community. Most public radio and TV stations have a community calendar on which they will announce events to the public.

A PSA typically heralds a community event, usually, but not always, for a non-profit organization. Commercial groups can also announce non-profit events or services. Many local newspapers also have community calendars so PSA's are not limited to only electronic media.

Though the PSA covers less material than a media release, it requires the same **who, what, where, when and why.** Also include your organization's name, a contact person and telephone number.

Formatting a PSA for Radio?
Radio PSAs should be submitted in written script, for use by the radio announcer. Write "for the ear" by reading your effort aloud. Repeat telephone numbers or dates. Spell out any numbers, dates or other figures and provide phonetic pronunciation (in parentheses) for any unusual words or names.

Use the following word count for an estimate of on-air time: 10 seconds -- 25 words; 20 seconds -- 40 words; 30 seconds -- 80 words; 60 seconds -- 160 words.

Keep rewriting and reading it aloud until your PSA copy flows smoothly and you definitely are under the time limit. Always include the date, your group's name, a contact person and telephone number. Use a separate sheet of paper for PSAs of different time lengths.

Remember, you cannot control when your PSA will be broadcast. Stay up late to hear it -- don't expect it to appear during prime time.

Formatting a PSA for Community Television Message Boards and Newspapers?
Community television message boards are another common means of distributing public service announcements in Newfoundland and Labrador. They will air the text of your PSA in continuous rotation for an extended period of time. The format they accept is extremely short, usually no more than 25 words. (In St. John’s the limit is 100 characters, including spaces.) Always adhere to your community station’s guidelines or there is a chance it may not be aired.

Local newspapers will usually list your PSA under their community calendar section. Again, find out the word limit for each paper in your area and adhere to their guidelines.

Other PSA Tips?

The best means of ensuring your PSA gets accepted is to determine the format and word limit required by each media organization it is being sent to.

Send your PSA at least two weeks before you want it used.

Try not to include any sort of price reference with your PSA - this may cause it to be rejected by some media organizations.

Remember the most important thing about a PSA is the **KISS – Keeping It Short and Simple!**

Source: www.envision.ca

Exercise 6 – Writing a public service announcement

Suggested time: 20 minutes

Objective

Write an effective public service announcement

Advance preparation

Review tips for writing a public service announcement

Exercise

Give participants five minutes to write their own public service announcement for a community event they are organizing. Ask them to identify which media they will use for the PSA.

Ask for volunteers to read their PSA and media selected.

> **Note to the facilitator**
>
> Depending on time you may wish to get everyone to read their announcement and critique them by asking if the who, what, when, where and why have been addressed. Discuss the choices of media and how they feel it will reach their target audience.

Facilitator resources

Participant resources

Pen and paper to write their public service announcement.

NOTES

Exercise 7 – Developing a communications plan

Suggested time: 30 minutes

Objective

Identify the communication methods that you would use to reach the target audience identified in exercise 5.

Advance preparation

Complete exercise 5 and understand target audiences

Exercise

Place participants in same groups as exercise 5. Participants will now discuss communication methods to reach their target audience and record some on the flipchart to report back to the large group.

> **Note to the facilitator**
>
> The exercise is not meant to develop a comprehensive plan but to get participants thinking of the various methods to reach their audience.

Facilitator resources

Participant resources pen, paper, flipchart or sheets

- **Discuss**
- **Refer to additional material on communications plans**

NOTES

8.0 Communications Planning

A communications plan can be a comprehensive strategy outlining tools, timelines, messages and evaluation strategies. Most organizations do not have the time or resources/staff for a detailed plan but have identified communications as a priority and utilize a variety of the following types of strategies to reach their audiences.

8.1 Strategies and Methods

- Regular news releases
  - Ensure that you have a newsworthy item
  - Ensure that you quote board or senior staff
  - Include background material if necessary
- Regular speaking engagements
  - Service clubs
  - School councils
- Submit articles to newsletters, industry publications
- Distribute annual report
- Use website wisely
- Arrange interviews with local media

8.2 Appoint Official Spokesperson

  - Designate official spokesperson for your organization as it ensures a credibility
  - Ensures consistent image and message
  - Provide guidance/training on interview skills

8.3 Budget

- Develop budget for advertising (print, radio, other)
- Develop budget for other initiatives
    - Presentations
    - Printing
    - Special events

Additional Material #7

Communication Plan

Article by Nancy Rathbun Scott

Dumfries, Virginia

What is a communication plan? When should it be developed? Where does the information in the plan come from? How do you write one, and why should you bother?

Overworked and underfunded communicators (Are there any other kind?) have a right to ask whether the work involved in developing a plan is worth it. The answer is yes because a written communication plan will

- give your day-to-day work a focus,
- help you set priorities,
- provide you with a sense of order and control,
- help get the chief staff executive and staff to support your program,
- protect you against last-minute, seat-of-the-pants demands from staff and members, and
- prevent you from feeling overwhelmed, offering instead peace of mind.

What Is a Communication Plan?

A communication plan is a written document that describes

- what you want to accomplish with your association communications (your objectives),
- ways in which those objectives can be accomplished (your goals or program of work),
- to whom your association communications will be addressed (your audiences),
- how you will accomplish your objectives (the tools and timetable), and
- how you will measure the results of your program (evaluation).

Communications include all written, spoken, and electronic interaction with association audiences. A communication plan encompasses objectives, goals, and tools for all communications, including but not limited to:

- periodic print publications;
- online communications;
- meeting and conference materials;

- media relations and public relations materials;
- marketing and sales tools;
- legal and legislative documents;
- incoming communications, including reception procedures and voice mail content;
- committee and board communiques;
- corporate identity materials, including letterhead, logo, and envelopes;
- surveys;
- certificates and awards;
- annual reports;
- signage;
- speeches; and
- invoices.

When to Develop the Plan

The best time to develop your plan is in conjunction with your annual budgeting or organizational planning process.

Where to Get Information

Grist for the plan generally comes from five sources:

1. your association mission statement,
2. a communication audit,
3. membership surveys and focus groups,
4. committee and leadership input, and
5. discussions with other staff and departments.

How to Develop the Plan

Take the following steps to develop an effective communication plan:

Conduct a research-communication audit. Evaluate your current communications. Some associations hire firms to do this, but the price for the objectivity of an outside auditor can be high. To conduct your own audit, find out

- what every staff person is doing in the way of communication,
- what each communication activity is designed to achieve, and
- how effective each activity is.

To get the answers you need,

- brainstorm with communication staff,
- talk to other departments,
- interview the chief staff executive,
- interview the board,
- talk to communication committee members,
- survey the membership,

- host focus groups, and
- query nonmembers.

Define objectives. Armed with information from your audit, define your overall communication objectives-the results you want to achieve. These might include

- excellent service to members,
- member loyalty,
- centralization of the communication effort,
- increased employee teamwork,
- improved product delivery,
- visibility for the association and the industry or profession it represents, and
- influence on government, media, consumers, and other audiences.

Define audiences. List all the audiences that your association might contact, attempt to influence, or serve. Included on your list may be

- members;
- nonmembers;
- consumers;
- related associations;
- adversarial associations;
- educators;
- federal, regional, and local governments;
- related industries; and
- the media.

Define goals. With stated objectives, and considering available human and financial resources, define goals-in other words, a program of work for each objective. Goals include general programs, products, or services that you will use to achieve stated objectives. For example, if the objective is to improve member service, goals might include improved training for the member-service function, special communications directed at first-time members, a reference manual for handling complaints, and ongoing information for members.

Identify tools. Decide what tools will be used to accomplish stated goals. These tools can be anything from a simple flyer to a glossy magazine. Don't overlook less obvious tools such as posters, report covers, Rolodex cards, and Web sites. Brainstorm ideas with your staff.

Establish a timetable. Once objectives, goals, audiences, and tools have been identified, quantify the results in a calendar grid that outlines roughly what projects will be accomplished and when. Separate objectives into logical time periods (monthly, weekly, etc.).

Evaluate the result. Build into your plan a method for measuring results. Your evaluation might take the form of

- a monthly report on work in progress,
- formalized department reports for presentation at staff meetings,

- periodic briefings of the chief staff executive and the department heads, and
- a year-end summary for the annual report.

Developing a written communication plan will take effort. Plan on three or four days the first time you do it. Once in place, the written plan will smooth your job all year long, earn you respect from the CEO and other staff, help set work priorities, protect you from last-minute demands, and bring a semblance of order to your chaotic job.

Nancy Rathbun Scott is president of Liberty Communications, Dumfries, Virginia.

- Source: http://www.hieran.com/comet/howto.html

- **Discuss**

9.0 Interview skills

- be prepared
- avoid off the record comments
- be eloquent
- be courteous
- tell the truth or don’t deny bad news
- ask for clarification
- be clear, brief and don’t chatter

- **Refer to additional material –**
  - **Handling Media Interviews**
  - **Quick Tips for Being Interviewed by the Media**

NOTES

Exercise 8 - Media interviews

Suggested time: 15 minutes

Objective

Discuss some strategies that participants have used or should use to handle media interviews so that participants can respond to media inquiries.

Advance preparation

Review/discuss material on media interviews.

Exercise

Use large group discussion and record on flipchart.

Notes to facilitator
You could also ask participants to role play an interview and have the interviewee be unprepared.

Facilitator resources

Flipchart

Participant resources

NOTES

Additional Material #7

Handling Media Interviews

To maximize your public relations activities, assign an official spokesperson for your organization.

In a municipality the official spokesperson is usually the mayor and his/her designate is the deputy mayor or the senior town official. In a community-based organization the spokesperson is usually the chairperson or senior staff person, and of course in volunteer organizations without staff it is the board chair or president.

The official spokesperson will often be contacted for an interview following a communication activity – news release, public event, etc.

So how do you prepare for the interview?

- Ask the interviewer for information on what they need to know and how much they already know
- Ask for the deadline and if possible ask for interview to be held before the deadline
- Review details of the interview and then agree to call the interviewer back with the required information
- Plan your message – write down what you want to say to the interviewer
- Provide additional material to the interviewer (this is good for print interview)
- For print interviews
    - Chose a comfortable place
    - Ask for questions in advance (may not be provided)
    - Ask to see article once it is completed (again, may not be provided)
- For radio or TV interviews
    - Ensure you know the setting – your office on the phone, studio, will there be others, is it news story or phone-in
    - Slow your speech
    - Speak in warm and pleasant voice
    - Answer questions as if you are talking to one person and not the entire audience

Adopted from: Parker, B. J. (2001). Tea you can trot a mouse on. Volume 1. Hubbards, NS: Wee Society.

NOTES

Additional Material #8

QUICK TIPS FOR BEING INTERVIEWED BY THE MEDIA

When a member of the media interviews you, you have a chance to do yourself and your organization a lot of good -- or a lot of damage! Here are some tips to help you handle yourself when being interviewed by the media.

1. **Don't chatter.** Try not to do all the talking. It's not supposed to be a monologue, but it is an easy trap to fall into because you are supposed to know a lot about the subject. A better approach is to give a brief answer, then stop and let the reporter ask another question.

2. **Ask for clarification.** Don't hesitate to ask questions of your own. If you are unsure of what the reporter wants or what slant they are looking for, ask!

3. **Only repeat what is repeatable.** Avoid off-the-record comments. What you are doing is asking the reporter to keep a secret that you can't keep.

4. **Don't make it up.** If you don't know, say so, but offer to find out. Remember to get the information back to the reporter in a timely fashion.

5. **Be eloquent.** If you want to be quoted, say something quotable. Reporters love short, pithy comments using lively words that really convey solid meaning. This is especially true for the broadcast (radio, television) media due to the scarcity of time.

6. **Talk to a general audience.** Use examples, talk to the reporter's audience and imagine your words being put into writing. The reporter is usually trying to convey your story to a wide audience -- so make it easy for the reporter to understand and to get it correct.

7. **Don't deny the bad news.** If you don't tell the bad news as well as the good news the reporter may not believe your good news -- not for long anyway. It's better to tell your side of the story before the reporter gets it from somebody else.

8. **Be courteous.** Thank them for interviewing you and providing coverage for your organization. Do not ask to read what the reporter will write prior to publication, this may only cause some resentment. Also do not ask for copies of the story to be sent to you -- go out and buy your own.

9. **Be human.** The key thing is to try to relate to the reporter as a fellow human, one prone to the same tendencies as you.

10. **Be prepared.** Reporters like having complicated facts, biographies and background information in writing, you should have a backgrounder prepared. Essentially, gather all the facts and viewpoints available – and be ready for the tough questions as well as the easy ones.

Source:
- Public Relations for the Non-profit workshop, Community Services Council

www.envision.ca

10.0 Monitor and evaluate communications plan

A major component of any communications plan is to monitor and evaluate its effectiveness. Has it reached its intended audience (s), facilitated desired change in attitudes, increased awareness of your organization and its mission and mandate?

Implement continuous evaluation

An organization should have a continuous evaluation process in place to monitor communications during and after an event. For instance, if a news release didn't make the news, follow up with media to learn if it was release, timing, or some other reason

10.2 Determine some evaluation strategies or benchmarks

- brochure distribution
- calls or website hits following an event or news release
- telephone calls or inquiries in response to an advertisement for an event
- types of inquiries
- media coverage
- attendance at events (include an evaluation to determine how they learned of the event)

10.3 Evaluation Matrix

- develop a matrix to evaluate your plan
- determine what you want to monitor and why
- incorporate items such as:
  - brochure distribution
  - website traffic
  - media response to news releases
  - inquiries to PSA
  - inquiries following release or event
  - calls following an advertisement
  - media coverage

10.4 Annual Report

- conduct an annual review and evaluation of your strategies so that you are not doing the same thing every year because you think they work.
- prepare an annual report outlining the year's activities and successes and outline any redundancy or ineffective strategies.

11. Parking Lot

Discuss any issues that arise throughout the day that are not part of the workshop.

12. Discussions/Questions/Summary

13. Evaluation

Ask participants to complete an evaluation which covers the material, the facilitator and the space/resources.

14. Appendices

Communications glossary

Facilitator tool kit

NOTES

Communications Glossary

Advertising

Advertising is bringing a product (or service) to the attention of potential and current customers. Advertising is focused on one particular product or service. Thus, an advertising plan for one product might be very different than that for another product. Advertising is typically done with signs, brochures, commercials, direct mailings or e-mail messages, personal contact, etc.

Body Language

Body language is an outward reflection of a person's emotional state as each movement or gesture can indicate what a person may be feeling or thinking at the time. For instance, folded arms may indicate that the person is feeling defensive or fearful. Body language is an important part of the communication process.

Blog

A blog (short for web log) is a user-generated website where entries are made in journal style and displayed in a reverse chronological order.

Branding

Branding involves a strong, consistent message about an organization, product, service or community which differentiates it from others. It is an image and feeling that people have and consists of their perceptions and experiences, some of which you can influence.

Channel

Messages are conveyed through channels which can be face to face meetings, telephone calls, letters, emails, and reports.

Describing Behaviour

Describing behaviour is a communication tool in which you state only what was observed and not what was said.

Email

An electronic message sent via internet to another person. Can be basic message or can include attachments such as letters, reports, photos, etc.

Enunciation

Enunciation is how clear you speak.

Feedback

Feedback is what you get from your audience in reaction to your message.

"I" statements

A communication tool to use when you want to explain your feelings. The tools is good for reduce tension and conflict.

Making an "I" statement:

When (describe behaviour and not person)
I feel (describe the feeling that you get)
Because (tangible or real effect) or how about (a suggestion for change)

Making I statements pushes the speaker to define what disturbs him/her about a situation.

Infliction

Infliction is the change in the pitch of your voice to emphasize words.

Listening

Listening involves listening to what an another person is saying. Active listening is a way of listening that focuses entirely on what the other person is saying and confirms understanding of both the content of the message and the emotions and feelings underlying the message to ensure that understanding is accurate. Hearing is a passive skill.

Marketing

Marketing is the wide range of activities involved in making sure that you're continuing to meet the needs of your customers and getting value in return. Marketing is usually focused on one product or service. Thus, a marketing plan for one product might be very different than that for another product. Marketing activities include "inbound marketing," such as market research to find out, for example, what groups of potential customers exist, what their needs are, which of those needs you can meet, how you should meet them, etc. Inbound marketing also includes analyzing the competition, positioning your new product or service (finding your market niche), and pricing your products and services. "Outbound marketing" includes promoting a product through continued advertising, promotions, public relations and sales.

Medium

The medium is the way to get your message across to your audience. More than one medium is media.

Media

Media are the medium to carry message and include traditionally include radio, television, newspapers, magazines, newsletters, and now include websites, electronic newsletters, etc.

Media (press) release

A media or press release is a newsworthy announcement that is sent to your media list.

Message

The message refers to what you are communicating and can be written, oral and can be impacted by the sender’s tone, method of organization, what is communicated, and the individual’s style of communicating.

Non-verbal communication

Non-verbal communication is what we say with our body – includes facial expressions, eye contact, tone of voice, etc.

Noise

Noise refers to noise in a message and can include interference from various sources and impacts the receiver’s attention.

Paraphrasing

Paraphrasing is a communication tool that allows you to restate or state in your own words, what was said in order to understand what you heard.

Perception checking

Perception checking is stating in your own words what you think another person

is feeling.

Pitch

The pitch of your voice is the point within range where voice is placed for speaking. Some people have a deep voice and some have a high pitched or squeaky voice.

Promotion

Promotion keeps the product in the minds of the customer and helps stimulate demand for the product. Promotion involves ongoing advertising and publicity, such as mention in the media. The ongoing activities of advertising, sales and public relations are often considered aspects of promotions.

Pronunciation

Pronunciation refers to how you pronounce your words.

Public relations

Public relations includes ongoing activities to ensure the organization or company has a strong public image. Public relations activities include helping the public to understand the organization or company and its services or products. Often, public relations are conducted through the media, that is, newspapers, television, magazines, etc. As noted above, public relations is often considered as one of the primary activities included in promotions.

Publicity

Publicity is mention in the media. Organizations usually have little control over the message in the media, at least, not as they do in advertising. Regarding publicity, reporters and writers decide what will be said.

Public service announcement (PSA)

A PSA is a brief announcement about an upcoming event that is publicized by local media at no cost.

Range

The range of your voice refers to the musicality of your voice.

Sales

Sales involves most or many of the following activities, including cultivating prospective buyers (or leads) in a market segment; conveying the features, advantages and benefits of a product or service to the lead; and closing the sale (or coming to agreement on pricing and services). A sales plan for one product might be very different than that for another product.

Sender

The sender is the person who sends the message and who must be credible, must know the subject, the audience and context in which the message is delivered.

Target Audience

A target audience is the audience your message is intended to reach

Verbal communication

Verbal communication is what we say and how we say it. It includes the range, pitch and volume of our voice, our enunciation and pronunciation, infliction and tone of our voice.

Website

A website is an internet site containing information on a government department, business, organization or individual for public viewing.

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Facilitator Tool Kit

1. Tools and Techniques

General

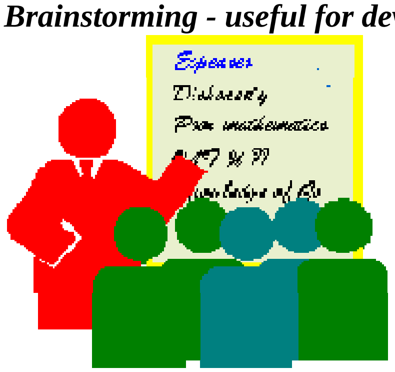
Before starting a facilitated session there should be some form of "contract" or agreement between the facilitator and the group. Many advocate that this should be written but this is not necessary providing there is a clear understanding on the basic issues such as;

- the role of the group
- the role of the facilitator
- the broad aims of the session (note these need to be checked with the group)

For facilitated sessions it is useful to breakdown the traditional barriers that exist between people. To assist with this it is often better to lay chairs out in an informal style that facilitates open discussion.

The main aim of the facilitator must be to remain neutral and ensure that there is the "buy-in" of all members of the group throughout the process. In order to ensure that the "buy-in" is there from the start it is necessarily to agree the common aims of the group and to agree to a process for meeting those aims before starting that process. This makes facilitated sessions appear to go slowly at the beginning but this apparent slowness will be compensated for as the group gets into its stride and the common goals and "buy-in" throughout ensures that they work as one.

Brainstorming - useful for developing ideas



Brainstorming is a useful method for identifying a wide range of ideas to solve a problem. It involves the group calling out the ideas which are then be recorded onto a flip chart. All ideas should be recorded and the session should be as free flowing as possible. Sessions can last any time from a few minutes to hours depending on the difficulty and complexity of the problem. Often the best ideas can come when the session appears to be all but finished.

When the free flow appears to slow it is often useful if the facilitator suggests a different situation such as "What would a politician do if he had this problem" or

"How would they solve it in the navy".

It is useful to post a set of rules at the beginning of the brainstorm. These should be agreed with all those taking part. A suggested set is as follows;

- No discussion of ideas
- Everyone to contribute
- Problem definition displayed
- Lots of ideas
- Positive encouraging atmosphere
- Allow time for thought
- Accept every idea no matter how crazy

Conceptual Models - useful for understanding initial ideas

When a group comes together to investigate a possible way forward for the future its individual members often have clear ideas of how they would see the future mapped. It is important that each member of the group has an opportunity to express those ideas at an early stage so that all members of the group can recognize the basic paradigms behind the thinking of the others in the group. Often these conceptual models are quite different but are still complimentary and can be used as the basic building blocks of the final deliverable.

Conceptual models are best recorded as a mixture of graphics and words on a flip chart.

Ranking and Rating- used for analysis of data

Following a brainstorm it is often useful to analyze the list formed to determine priorities. There are a number of methods of undertaking this type of analysis.

Simple Tally
Each member of the group are given the chance to come to the sheets with the list of ideas and to place tally marks against (say) the top 5 items in their view. Items are prioritized according to the tally score. This is useful for its speed; it also has the benefit that group members need to get up out of their seats to write at the flip chart.

Weighted Tally

A slight variation on the above is the *weighted tally*. Each member of the group is asked to come to the front and score the ideas on the list from (say) five to one with five being their top score. The additional "gearing" has the effect of separating close scoring.

Consensus Marking
Where time is short, the list is long and the group is small. The members of the group can be asked to call out marking against (say) 1 to 10 for each item on the list. Providing the group is working well together an initial call may be challenged until a consensus is reached. The debate that ensures in reaching the consensus is often useful in increasing the understanding of the particular point.

The Multiplier Tally (or Consensus)
Often there are two criteria against which items need to be judged, for example "effectiveness" and “ease of implementation". Once again tally style scores are taken from each of the participants but this time it will be under each category. The two numbers are then multiplied to create the final priority list, although it is sometimes useful to also look at high scores under each of the criteria.

Force Field Analysis - useful for the analysis of the merits of apparently conflicting ideas

Simple Force Field
In its simplest form two ideas or solutions are written down either side of a line. The group is then asked to identify pressures that will move the line in either direction to either of the solutions. For example if the problem to be solved was inaccuracy in expense claims and one solution was to place them on computer while the other was a more complex paper form then the pressures may be as follows.

Towards the computer system;
Most errors are mathematical computer will resolve this
Computer system will check mileage to counter dishonesty
Computer system will check for level of expense against guidelines
VAT correctly accounted
User has previous expense claims to hand to check details

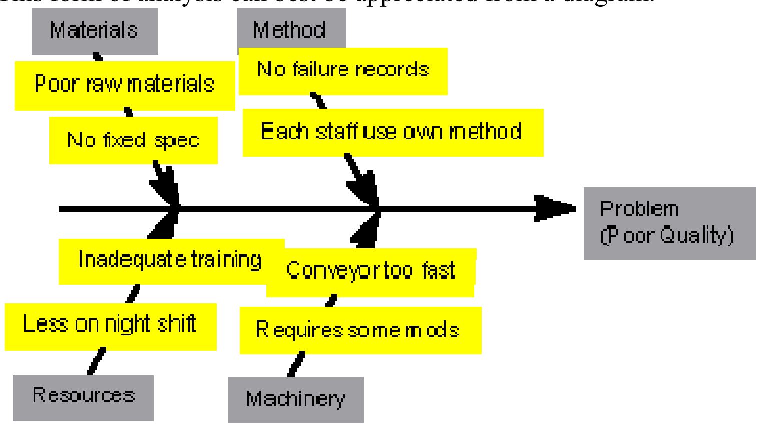
Towards the paper systems;
Some users still not familiar with computers
Paper system allows receipts to be submitted at the same time
If arrows are placed against the "forces" with their length approximately proportional to their effect then the picture of which is the best solution

Neutral Statements Force Field
The Force Field analysis can be used to assess up to about 5 options using a variation. Each of the options is identified with a symbol and a series of neutral statements is determined by which the options can be judged. For the example above such statements may include speed of payment, consumer usability, system usability, accuracy, outlying office use. Marking judgements are usually developed by consensus with the group and the appearance for the two options above might be something like that shown below.

Black Ball Analysis - useful for comparing a number of options
For Black Ball analysis each of the options is given a name and are then listed down the side of a flip chart. The participants are then asked for the criteria against which they wish to judge the various options. The number of criteria should ideally be restricted to about 6 to make for a practical way forward. Each criteria is then taken in turn and the options discussed. If an option fully meets the specific criteria it is given a black ball. If it partially meets the specific criteria it is given a half black ball and if it generally does not meet the criteria it is given a white ball. A simple addition at the end yields the answer as to the best option while the overall pattern of balls on the flip chart can sometimes be used to identify areas where, for instance, all of the options are weak.

Cause and Effect Analysis and Solution Effect Analysis (Fishbone) - useful for determining the root cause of a problem or for analysis of potential solutions

This form of analysis can best be appreciated from a diagram.



The headings at the end of each arm need to reflect the nature of the problem. In cause and effect the team is looking at potential factors that may lead to the "effect" or problem. The solution / effect diagram is the same shape but works the other way round. At the head is the solution the team are looking for potential effects out on the arms. This is useful for testing whether there are likely to be any likely unwelcome side effects to a solution.

Fishbone diagrams can be used as part of the normal tool kit in meetings or workshops or alternatively they can be pinned to the wall and contributions sought on "Post-It-Notes"™ over a period of time.
Whichever system is used the result will be a series of categorized possibilities along the arms (or bones!). The next aim is to look for links between those possibilities to begin to understand the root causes in the case of cause and effect or possible unwanted effects in the case of solution effect.

Process Flow Diagrams - useful for determining a series of actions

Process flow diagrams outline in order the steps necessary to complete a task. It is not always easy to recognize all of the steps necessary and it is frequently necessary to use a variant of the brainstorm to collect a list of likely steps. Each member of the group is asked to write onto "Post-It-Notes"™ suggestions for the steps; these are collected and categorized before starting the diagram. The easiest way forward is to then ask for the first and last steps followed by the step nearest the middle. The gaps between these can then be looked at in a similar way by filling an item near the middle each time until the overall diagram takes shape.

Analysis at the end should endeavour to remove nay steps which cause a return backwards as these are where the inefficiencies are to be found.
With the addition of time and resource allocation process flow diagrams become a planning network.

Source: http://www.users.waitrose.com/~dhollis/tq/facilt.htm

NOTES

2. Icebreakers

http://www.nwlink.com/~donclark/leader/icebreak.htmlor the

For the following activities, it often helps to break the group into couples or trios. The smaller groups allow for more discussion, keeps participants from mentally wondering off, builds rapport, and allows for "one-on-one" relationships.

You can also break a large group into small groups by having them discuss the activity with the person behind them, or having people take a different seat when they return from breaks or activities. The idea is to get them to meet and learn about other people besides their friends or favorite partner.

Icebreakers

Icebreakers are structured activities that are designed to relax learners, introduce them to each other, and energize them in what is normally an unduly formal atmosphere or situation. Icebreakers are not normally related to the subject matter, where as "openers" are related to the subject matter that is to be discussed. In addition, they often help to break up the cliques and invite people to form random groupings in a non-threatening and fun way.

The term "icebreaker" comes from "break the ice", which in turn comes from special ships called "icebreakers" that are designed to break up ice in the arctic regions. And just as these ships make it easier for other ships to travel, an icebreaker helps to clear the way for learning to occur by making the learners more comfortable by helping to bring about conversation.

Listed below are a few icebreakers to help get you started.

The Magic Wand

You have just found a magic wand that allows you to change three work related activities. You can change anything you want. How would you change yourself, your job, your boss, coworkers, an important project, etc.? Have them discuss why it is important to make the change. Another variation is to have them discuss what they would change if they become the boss for a month. This activity helps them to learn about others' desires and frustrations.

Marooned

You are marooned on a island. What five (you can use a different number, such as seven, depending upon the size of each team) items would you have brought with you if you knew there was a chance that you might be stranded. Note that they are only allowed five items per team, not per person. You can have them write their items on a flip chart and discuss and defend their choices with the whole group. This activity helps them to learn about other's values and problem solving styles and promotes teamwork.

The Interview

Break the group into two-person teams (have them pick a partner that they know the least about). Have them interview each other for about twenty minutes (You can also prepare questions ahead of time or provide general guidelines for the interview). They need to learn about what each other likes about their job, past jobs, family life, hobbies, favorite sport, etc. After the interviews, reassemble the group and have each team introduce their team member to the group. This exercise helps them to learn about each other.

Who Done That?

Prior to the meeting, make a list of about 25 items relating to work and home life. For example, a list for a group of trainers might have some of the following:

- Developed a computer training course
- Has delivered coaching classes
- Is a mother
- Knows what ADDIE means and can readily discuss it
- Enjoys hiking
- Has performed process improvement
- Served in the Armed Forces
- Is a task analysis expert

Ensure there is plenty of space below each item (3 or 4 lines) and then make enough copies for each person.

Give each person a copy of the list and have them find someone who can sign one of the lines. Also, have them put their job title and phone number next to their names. Allow about 30 minutes for the activity. Give prizes for the first one completed, most names (you can have more that one name next to an item), last one completed, etc. This activity provides participants with a list of special project coaches and helps them to learn about each other.

The ADDIE Game (Analysis, Design, Development, Implement, Evaluate)

Make up a reasonable problem scenario for your organization where people need to get introduced, e.g. "The manufacturing department is bringing in 20 temporaries to help with the peak season. They want us to build a short activity that will allow the permanent employees to meet and introduce themselves to the temporaries." Break the group into small teams. Have them to discuss and create a solution:

- Analyze the problem - Is it a training problem? If they decide that it is not a training problem, then remind them that most problems can be solved by following an ADDIE type approach.
- Perform a short task analysis - How do people get to know each other?
- Design the activity - Develop objectives, sequence.
- Develop the activity - Outline how they will perform the activity and trial it
- Implement - Have each small team in turn, introduce themselves in front of the group using the activity they created.
- Evaluate - Give prizes to the most original, funniest, etc. by having the group vote.

This activity allows them to learn about each other's problem solving styles and instructional development methods, it also introduces the members to each other. This method can also be used to introduce the ADDIE method to new trainers.

Time - about 60 minutes.

Finish the Sentence

Go around the room and have each person complete one of these sentences (or something similar):

- The best job I ever had was...
- The worst project I ever worked on was...
- The riskiest thing I ever did was...

This is a good technique for moving on to a new topic or subject. For example, when starting a class and you want everyone to introduce themselves, you can have them complete "I am in this class because..."

You can also move on to a new subject by asking a leading question. For example if you are instructing time management, "The one time I felt most stressed because I did not have enough time was ..."

Reviews

While icebreakers are used to start a learning session, reviews are used in the closing of a session or module. They help to reinforce key concepts or topics.

Frame Game

Give each learner four blank cards and instruct them to fill in four different responses on the subject: "What were main concepts or learning points of the material we just covered?" Give them about five minutes to complete the exercise, then collect the cards, shuffle them, and randomly deal three cards to each learner. (Note: If desired, the trainer can make up four cards of her own, but they should be philosophically unacceptable with the principles presented. That is, play devil's advocate.)

Ask everyone to read the cards they just received, and then to arrange them in order of personal preference.

Place the extra cards on the table and allow them to replace the cards in their hand that they do not like. Next, ask them to exchange cards with each other. They must exchange at least one card.

After about three minutes, form them into teams and ask each team to select the three cards they like the best. Give them time to choose, then have them create a graphic poster to reflect the final three cards.

Select or vote on best poster that best represents the topic.

Rearrange the Classroom (Change)

Prior to class, set the desks up in the old "traditional" classroom row style. Except, that you should set your stage (podium, flip chart, etc.) in the back of the class. Start your presentation (you will be behind them, facing their backs). Explain to them that this is how a lot of change is implemented in organizations. The leaders get behind their employees and attempt to "push" them into change. And the attempt to change is about as successful as trying to conduct a class this way.

Also, point out that this is how a lot of traditional organizations are set up, in nice even rows (departments), where it is hard to communicate and learn from each other. But, real teams develop when we break out of our boxes and design organizations that have cross functional teams working with each other. Ask them to rearrange the room so that real learning, communication, and teamwork can take place. Depending upon your learners, you might have to give them a few pointers to get started, but then get out of the way.

During the next break or after lunch, have them rearrange the room again, using some of the techniques that they learned. This can be repeated several more times, depending upon the length of the presentation. But, each time they change the setting, it needs to reinforce a concept that they previously learned.

Toy Story

Using Legos, Tinker Toys, clay, log cabins, etc., have each person or small group build a model of the main concept that they have just been presented. After a given time period, have each person or team present their model to the group. They should describe how their model relates to their work or the subject being taught.
Encourage creativity!

Ball-Toss

This is a semi-review and wake-up exercise when covering material that requires heavy concentration. Have everyone stand up and form a resemblance of a circle. It does not have to be perfect, but they should all be facing in, looking at each other. Toss a nerf ball or bean bag to a person and have tell what they thought was the most important learning concept was. They then toss the ball to someone and that person explains what they though was the most important concept. Continue the exercise until everyone has caught the ball at least once and explained an important concept of the material just covered.

Process Ball

This is similar to the above exercise, but each person tells one step of a process or concept when the ball is tossed to them. The instructor or learner, in turn, writes it on a chalkboard or flip chart. For example, after covering "Maslow's Hierarchy of Needs," you would start the ball toss by having everyone give one step in the pyramid of needs, e.g. Safety, Physiological, Esteem, etc.

Motivators

Motivators are designed to help encourage the learners.

Positive Reinforcement Cards

Whenever a learner arrives to class on time from breaks, lunch, etc. give them one playing card. You can also hand out cards to people who volunteer for activities, are helpful, answers a difficult question, etc. At the end of the day, play one hand of poker. However, the only cards that are used are the ones that were given out throughout the day. Give a small prize to the best hand (you can also pick the top two or three hands if you are able to give away more prizes). Note that the more cards a person has, the better the chance of winning.

Calm Down!

Sometimes the problem is not warming up, but the need to calm or "come down to reality" after a session of intensive material is given. Also, to get the full benefit of new material, some "introspective time" might be needed.

Have the learners lay their heads on their desks, lay on the floor, or get in a comfortable position. Then, have them reflect on what they have just learned. After about five minutes, say a key word or short phase and have them reflect on it for a couple of minutes. Repeat one or two more times then gather the group into a circle and have them share what they believe is the most important points of the concept and how they can best use it at their place of work.

Note: This may seem like slack time to many, but reflection is one of the most powerful learning techniques available! Use it!

3. Sample Pre-Session Questionnaire

Name: ____

Organization:____

Position:____

How long have you been with the organization?_______________________

How do you think you learn best?

☐ By listening (Audio Learner)
☐ By doing -- practical, hands-on method (Tactile Learner)
☐ By seeing a demonstration by instructor, slides, or visual aids (Visual Learner)
☐ By discussing concepts with others or asking questions (Interactive Learner)
☐ By practicing – role plays, practice demonstrating skills (Kinaesthetic Learner)
☐ A combination of the above (examples)
____
☐ Not sure how you prefer to learn

What do you expect from this workshop? Do you have any specific expectations?

____

____

____

Do you have special considerations you want to share with the facilitator? (Learning challenges)?

____

____

____

Other comments

____

____

____

____

____

____

Adapted from the Trainers Handbook and Success Strategies for Adjunct Faculty

NOTES

Pre-session Questionnaire

Adapted from *The Trainer's Handbook* and *Success Strategies for Adjunct Faculty*.

DATE: ______________________________ *2 pages total*

The following information will enable the instructor to meet your individual learning needs more accurately. All information will be kept confidential.

Name: __________________________________

Course___________________________________

MailingAddress:____

____

____

Telephone (Daytime) ______________________

(Evening) _____________________________

Email: ____

Employer____

Your Position Title

____

Briefly describe the duties/responsibilities of your current position:

____

____

In your current position, do you supervise people? __________ If yes, how many?__

Excluding college and university education, what other training have you attended (workshops, conferences, management training, seminars)?

____

____

____

How do you think you learn best?
☐ By listening (Audio Learner)
☐ By doing -- practical, hands-on method (Tactile Learner)
☐ By seeing a demonstration by instructor, slides, or visual aids (Visual Learner)
☐ By discussing concepts with others or asking questions (Interactive Learner)
☐ By practicing – role plays, practice demonstrating skills (Kinaesthetic Learner)
☐ A combination of the above (examples)
____
☐ Not sure how you prefer to learn

What is one specific thing you want to learn from this training program?

What concerns do you have about participating in this training program?

Do you have special considerations you want to share with the trainer (Learning challenges)?

Other comments

4. Session Evaluation

Please rate your reaction

Activity	**5**	**4**	**3**	**2**	**1**
Agenda followed					
Expectations met					
Material covered					
Activities conducted					
Participant materials					
Facilitator					
Physical facilities					
Refreshments					

Other Comments:

NOTES

Some facilitating phrases

1. What do we need to discuss or take action on in this meeting? In what order should we discuss these items? How should we divide our time among those agenda items; we have only a total of ___ minutes.

2. Let's take a few moments to brainstorm (task). Or, How about if we hear everyone's ideas and suggestions before we discuss or vote on any one of them?

3. Let's go around the room and have each person in turn indicate……

4. How about if we take the next ___ minutes to do a ____ (exercise) with the purpose of ____ (task or outcome). Does that seem appropriate at this time?

5. I need help. I'm not sure what would be the best approach for accomplishing _____(task). How would you suggest we approach it?

6. What is the underlying problem(s)/concern(s)/need? OR What is the desired outcome? OR I still don't have a handle on the underlying problem.

7. I feel the need to establish priorities. I'm afraid we're trying to accomplish too much in one day.

8. John, what do you think about this one?

9. Good suggestion. Did everyone hear that? Thanks.

10. If I heard you correctly, you think (feel)……

11. How about if we break into three groups of 8 and take 20 minutes to discuss___ and come up with some suggestions to share with the rest of the group.

12. Summarize: The ideas presented so far are…….

13. Have you considered? How about? Would it be appropriate to?

14. Do we all agree that?

15. I’m concerned about ___________(behaviour of the group)

16. Say a little more about that.

Facilitator Competencies

The following four clusters and a list of skills and attributes have been identified as necessary for effective facilitation.

Personal Attributes	**Team Attributes**
Displays confidence	Has professional boundaries
Is adaptable	Respects self-disclosure
Demonstrates sense of humour	Is willing & able to assess self
Displays sensitivity	Is aware of sensitive issues
Is resourceful	Believes in purpose/mission
Exercises confidentiality	Has strong desire to bring about change
Demonstrates respect	Believes in process
Listens well	**Facilitation Skills/Processes**
Is approachable	
Knows own prejudices	Understands and conducts research
Displays enthusiasm	Has planning skills
Has desire to work with people	Seeks more knowledge of facilitation
Is flexible	Understands mission statement
Communicates well	Able to co-facilitate
Is objective	Provides a model
Instructional Skills	Prepares well
	Keeps people focused
Makes members feel important	Has problem-solving skills
Eases transition through problem solving	Handles resistance
Can summarize	Has delegation skills
Has motivational skills	Attends to the group
Possesses critical thinking skills	Is able to read the group
Is able to resolve conflict	Displays neutrality
Is able to draw people out	Respects ground rules
Has organizational skills	
Has time management skills	
Gives and receives feedback	

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