"THINKING SMART" ABOUT COMMUNICATIONS:

A STRATEGIC COMMUNICATIONS GUIDE TO LAUNCHING YOUR D4AD INITIATIVE

JUNE 2020

About This Guide

This guide, prepared by Communication**Works**, L.L.C. for the Data for the American Dream (D4AD) project, provides leaders of new D4AD initiatives and their partners a comprehensive strategic communications framework to plan and launch their efforts.

About Data for the American Dream (D4AD)

Data for the American Dream (www.d4ad.com) is a consortium bringing together Schmidt Futures, Lumina Foundation, Walmart Foundation, and the Walton Family Foundation. D4AD currently funds pilot initiatives in three states (Colorado, Michigan, and New Jersey) that will help provide low-income, lower-skilled, underemployed, and unemployed workers access to current and actionable data, enlisting local case managers from public and private agencies to counsel jobseekers, help them access needed services, and reach the most underserved populations. The National Center for Higher Education Management Systems (NCHEMS) is the implementation partner of D4AD. NCHEMS is a private nonprofit organization whose mission is to improve strategic decision making in postsecondary education for states, systems, institutions, and workforce development organizations in the United States and abroad.

Table of Contents

OVERVIEW

The moment has come. You are ready to make public the tools, resources, and strategies that are all part of your D4AD initiative. Or are you? This guide is designed to provide strategic and practical suggestions for launching your initiative officially. A launch is more than a single event: it marks the first of many stages of the initiative and sets the tone for what it will happen next. This guide is organized around three key stages, including

1. The planning phase ("Laying the Groundwork for Success")

2. The roll-out of the initiative ("Launch") and

3. The period following the launch, which is crucial to building momentum to advance the agenda ("Maintaining Momentum").

Each section of this document outlines high-level considerations necessary to plan communications for your initiative successfully, and references tools and resources that you can use to guide implementation, which are located in the Appendices of this plan.

We emphasize the word "necessary." Communications efforts don't need to do everything and engage everyone; they need to be highly focused to do what will work best to advance your D4AD effort. And because each initiative has different goals and faces different circumstances, no two approaches will look alike. In fact, we urge you to create communication strategies that grow out of your initiative's goals and that the particular needs and circumstances it has been created to address.

LAYING THE GROUNDWORK FOR SUCCESS

You have just started working on your D4AD initiative. You have a plan, funding, and know what tools and resources you are going to build. You have identified partner agencies and organizations that will be involved and know that the tools and services won't be ready for a while, maybe not even for another nine months to a year. So, there is no need to think about how you are going to launch your initiative at this point, right?

Well, yes and no.

You obviously have many significant priorities, such as hiring designers and engineers to create your initiative's online information tool and working with state agencies to share and coordinate key data systems. But just because you have other priorities doesn't mean you should not start planning for the announcement. You can identify someone to be responsible to plan communications and outreach activities and begin the planning process. This also will allow you to begin early some crucial communications efforts, such as introducing the initiative to members of key partner groups that can expand your reach, or meeting with targeted legislators if you are about to enter or currently in the budget cycle. But communications should not be a last-minute activity that begins when you are ready to make a public announcement.

COMMUNICATIONS PLANNING GUIDE OVERVIEW

Your communications plan doesn't have to be a carbon copy of plans and strategies used by other D4AD initiatives: It should address your own unique goals and objectives, the context in which the initiative has been developed, and other factors, including your communications capacity. This guide is not intended to be a template for every plan, rather a tool to help you "think smarter" as you develop your own communications effort. The plan can be begun on a napkin or the back of an envelope or in a sophisticated software program. It should be shared in whatever shape or form you are comfortable with—such as a narrative that captures strategic and tactical approaches with an action plan identifying who is responsible for what, to a week-by-week action plan and timeline, as a PowerPoint presentation, or as series of charts and graphs or in an Excel spreadsheet.

Strategic Overview

Consider developing a concise overview of your communications approach that identifies the basic thrust of the effort and paints a picture of the scope and intended outcomes. You may want to address some key questions, including:

• How will the initiative go about doing its work?

• How will the work help meet the goals of the project itself?

• Who will be involved in the effort?

• What are key communications strategies that will be followed?

• What is the timeline and proposed staging for aspects of the initiative to happen?

• What resources will be leveraged?

These tasks are intended to help you synthesize the most important things you want to accomplish and will allow you to communicate with colleagues and partners your overall approach, what you plan to do and how, and what it will take to achieve your objectives.

Goals and Objectives

The overarching goals of the initiative serve as the backbone for all strategic planning. Stated initiative goals ensure that the effort remains focused and uses resources to advance core objectives. Communications goals should be closely aligned with the goals of the initiative. They help focus outreach on key areas of activities that can lead to measurable outcomes needed to build buy-in and support. The outcomes might be anything from increased referrals from partners to a higher percentage of long-term job placements and reduction in individuals who return regularly for services, to more stable, long-term funding for your initiative. *See Appendix A: Developing Communication Goals and Objectives.*

Environmental Scan

Identifying the potential challenges and opportunities your initiative may face—the elements of an environmental scan—is a crucial step in developing an effective strategy. By addressing your biggest challenges (political, financial, systemic, demographic, etc.), considering your position in the field, and building from your strengths, you can develop strategies and tactics that will be focused and aligned with the goals of the initiative, to ensure that your work is productive and effective. *See Appendix B: Addressing Challenges and Leveraging Opportunities.*

Audience Analysis

Each audience has different needs and perspectives, works through diverse networks, and may be best involved at different times in the life cycle of the initiative's campaign. Analyzing and prioritizing audiences, considering their needs and concerns and the desired actions you would like them to take, will further focus your work, help to devise effective strategies to reach them, and help you better mobilize your allies to support the initiative as champions and influencers. *See Appendix C: Analyzing Audiences.*

Core messages

Before you launch, you need to spend time determining what will make people pay attention to your work and what you want them to take away from initial contact. You will need to be intentional about language and developing specific messages you can use to capture what the effort is designed to accomplish, why it is essential, what you are trying to change or improve, and how people can benefit from or support your work. *See the grantee section of the D4AD website for the D4AD core messages and messaging framework.*

Strategies and Tactics

A strategy is a plan of action designed to achieve a particular goal that is typically animated by effective tactics—specific activities that, when implemented, can advance key objectives of your work. Aligning your goals and objectives with specific strategies and tactics is an important planning process. For example, one of your goals may be to grow the percentage of workers between the ages of 18-25 engaged with the workforce development system in your state, with a particular objective of reaching young men of color in your two largest urban centers. A strategy to achieve this goal might be to engage community organizations that work with the target population(s) to lead or support outreach and engagement. Key tactics might include efforts to spark engagement with these young people, such as hosting open houses or job fairs or focus groups for this demographic, to introduce them to D4AD and get feedback about it, or to co-develop communications materials with other organizations that reach the target audience(s). *See Appendix D: Developing Smart Strategies and Tactics.*

Resources and Expertise

Identifying and assessing your own internal capacity (expertise and availability of personnel; finances) can help ensure that you have the right people and adequate resources to execute the plan, either internally or through a combination of your own resources and external partners. *See Appendix E: Assessing Resources and Assets.*

PLAN BIG—AND BACKWARDS

A quick review of some common mistakes leaders and organizations make in rolling out a product or service launch, or in launching an initiative to draw attention to key issues, can help set you off on the right foot as you begin your planning process. We have identified several areas where leaders and organizations sometimes go wrong, including:

- **Beginning too late.** Too often, planning doesn't begin until it gets too close to the time of implementation. As a result, there is little time to lay the groundwork for the launch, such as in-person outreach and securing key partners, inviting prominent leaders, placing commentary pieces to help make the case for D4AD, or simply getting the right space, people, and materials prepared. By starting at the end, at the events you want to hold and the goals for those events, you can work backwards to see what needs to be done by which point in the plan in order to reach your goals.

- **Losing control of the agenda.** One of the least desirable situations that can happen is giving authority for the launch over to partners who don't truly share your agenda. The results can be to create a perception of weak leadership for the initiative, a skewed agenda, activities that do not strategically advance the goals of the effort, inappropriate messaging, and other problems.

- **Being tone deaf to the moment or the audience (the COVID-19 problem).** As we developed this guide, the nation and the world were reeling from the impact of the COVID-19 pandemic and the resulting economic downturn. Like any catastrophic event, the pandemic has overwhelmed virtually every aspect of our daily lives and put a significant strain on our workforce systems and the workers and jobseekers the initiative seeks to support. Not talking about this problem and what workers and workforce systems have been through would ignore the challenges confronting the majority of our workforce. Even as states and workplaces begin to reopen, it will be nearly impossible to talk about strengthening workforce development and providing workers with better career pathways without acknowledging the pandemic and its effects. While D4AD was not developed in response to COVID-19, the current situation makes the need for initiatives like D4AD even more pressing. D4AD messaging should provide ways to talk about this challenge and opportunity.

- **Mistiming the launch.** In thinking through when to launch an initiative like D4AD, be careful to avoid planning your launch when other news or events are sure to overwhelm your announcement or because it is simply a poor time to garner attention. Don't make a major announcement in November or early December around the time of a national election, on a national or religious holiday, or in the dead of summer.

- **Following an insular and self-contained planning process.** Oftentimes, leaders may be focused too much on their own organization and envision a relatively small, self-contained event and then, as the moment gets closer, various stakeholders have exciting new ideas and the event grows, creating an unmanageable amount of work at the last minute. It is far easier to plan big and then scale back than to plan small and scramble to add on events, partners, resources, and perspectives. While this guide is an effort to provide professional advice, it also can help to have communications professionals on your planning team or as advisors to ensure that you identify opportunities and risks, have a sense of what activities will have the most impact, and are sure to take advantage of all your assets and what strategic allies can bring to the table.

• **Lack of clarity about purpose.** Initiatives can get into trouble when they do not follow their own follow their own goals and fail to assign the right level of focus and effort on the most important things. You will need to prioritize what's most important to communicate to whom, when, and how. In planning the launch, it is crucial to clarify what you want to accomplish. Is it simply to get attention? To mobilize workers to take advantage of new tools and supports? To demonstrate concerted action and rally key organizations and political leaders to your cause? To ensure you have a strong ground game and can mobilize your body of employment advocates, caseworkers, and counselors? To reach a particular audience who will be essential to your initiative's success? Each purpose needs to be thought through—with a short-, intermediate-, and long-term strategy, designed according to your priorities, that can grow into fulfilling the overall desired outcomes of the initiative.

For planning purposes, it is particularly useful assign what percentage of focus you want to give key aspects of the work in different phases of the announcement, recognizing that these may change over time. For example:

PLANNING PHASE	
1. Getting the strategy right	40 percent
2. Building allies	25 percent
3. Informing practitioners	20 percent
4. Developing agreements to be announced	15 percent
5. Drawing media attention (creating something newsworthy)	0 percent (part of objective 1)
LAUNCH PHASE	
1. Reaching/bringing together representatives of key target audiences	40 percent
2. Drawing media/social media attention	40 percent
3. Engaging political leaders	10 percent
4. Connecting with other efforts in the field	10 percent
POST-LAUNCH PHASE	
1. Identifying and maintaining successful strategies for reaching target audiences	50 percent
2. Maintaining engagement with partners and allies	15 percent
3. Expanding policymaker awareness and support	15 percent
4. Sharing best practices in the field	10 percent
5. Ongoing media awareness of accomplishments	10 percent

D4AD is a complex initiative that endeavors to accomplish multiple things. You may want to meet many goals and objectives, but that will require having a strong base of partners, champions, and supports to begin with as well as a strong communications capacity and suitable resources.

As you sort out the priorities for different phases, be aware that in the ideal situation the planning phase is perhaps the most important of the entire initiative. For example, imagine that before your launch that you gathered new evidence about how this effort could impact a significant portion of workers in your state and could build a coalition of strategic partners who make specific commitments about what they can do at the launch. Imagine that these commitments came from the governor and key public agencies, mayors and county commissioners, major employers, and the state's most influential community-serving agencies. Such a show of force would enable you to create significant visibility and impact from the beginning. Alternately, you may know from the beginning that such an announcement is not possible (possibly because the media will not be engaged, because people won't come together to address the needs of low-income, low-skilled workers, or because there is strong opposition to your agenda). Even so, you can use the launch to bring key audiences together, roll out important information, and build support by communicating to pivotal leaders, policymakers, and allies how this effort advances their own agendas and how they can help.

- **Lacking the goods to get media coverage.** Many times leaders and organizations want to make a big splash but haven't done the prep work—such as framing the issue in a unique way, identifying new data that introduces compelling circumstances and clearly illustrates the challenge, or bringing in the governor and other powerful speakers—to draw attention to an initiative. If you want to make news, you have to have elements that draw coverage, such as a controversy, a new take on an age-old challenge, a well-known spokesperson or powerful allies, good human interest stories that relate to people's lives, and/or a clear call to action.

- **Misusing your platform.** Sometimes leaders have their own private agendas (to please a particular funder or to grow their own personal standing). They make themselves or others too much the center of the stage.

- **Focusing too much effort on one activity (putting all your eggs in one basket).** This most often occurs when a singular launch event is seen as the be all, end all. However, a single event will only reach a limited audience (albeit may be your largest audience reach). Developing a main event, augmented by smaller events and other outreach strategies over a defined period of time, will help to create wider visibility and more momentum.

By planning backwards and thinking big, you will be able to advance multiple goals, get the most of your resources, be ready to spring into action at the appropriate scale, and have a strategic impact. You will be able to see quickly what you have the capacity to handle and what will need to be cut or tabled until you know you have the capacity and can engage key strategic partners to get their buy-in, build connections to the audiences they bring, and ensure that the plan is feasible for them as well.

LAUNCHING FOR SUCCESS

A Korean proverb—"the first step takes you halfway there"—captures the importance of the initial action. A launch plan lays the groundwork for all that follows. The launch itself sets the tone and tenor of how you will work. It reveals what you bring to the table, what you stand for, your ability to deliver, the strength of your network, the commitment of your champions, and, most importantly, the integrity and inclusiveness you bring to the cause. It can be an opportunity to provide a show of community commitment—bringing together prominent leaders and champions who will stand with you and the groups who will work in common cause. It is also a chance to identify clearly the scope or magnitude of the problem that needs to be solved, the benefit of the initiative, and the solution that is commensurate in magnitude with the size of the problem. The planning and launch phase can set up and set in motion all that will follow, allowing you time to make a powerful case and gather evidence, to differentiate what you will deliver, and to inform key influencers and cultivate champions who will be crucial for generating the long-term sustainability of your work.

Remember that what you are announcing is not as exciting to most as the next smash-hit movie, and that you also don't have a Hollywood budget. D4AD is a somewhat technical policy initiative that is focused on addressing a problem that may not be a top priority for some leaders and may also be invisible to the wider community. Your capacity and resources may be limited, and you may need to develop a n approach that will be carefully targeted to have the most impact, making the best of the assets that you actually have. These can be a powerful message; committed allies and champions; a strong grassroots network, or army of practitioners and advocates on the ground that, if orchestrated well, will make all the difference in success, regardless of your budget or capacity. These conditions present the reason to be highly strategic about building interest and support.
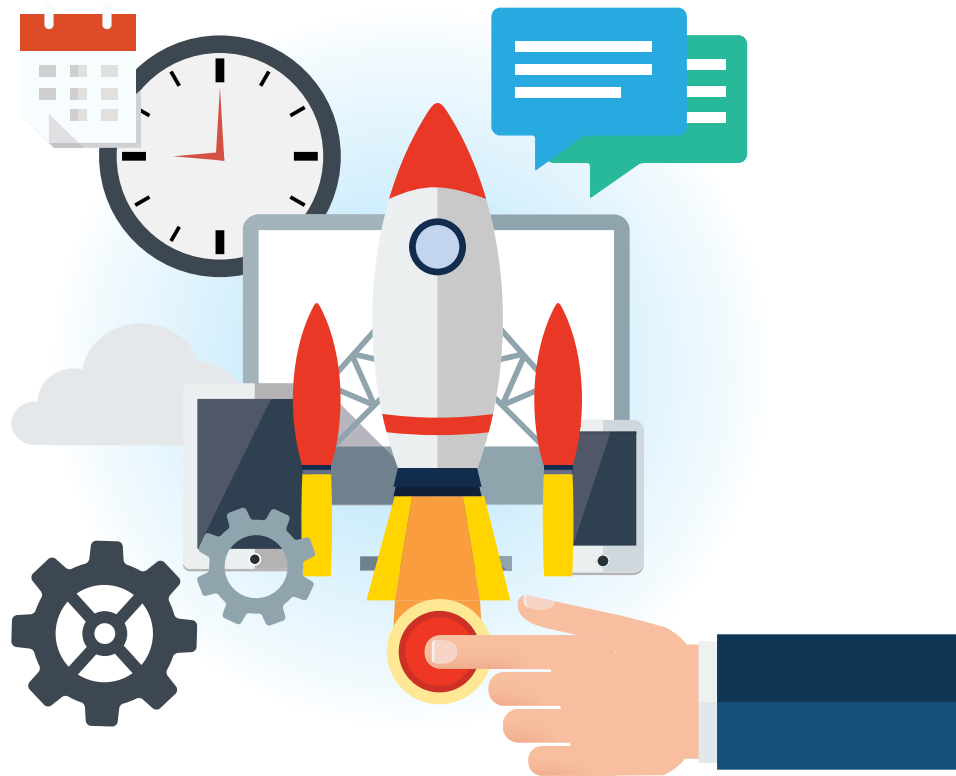
STRATEGIC CONSIDERATIONS

No amount of resources will help if you don't a good strategy. You need to determine the most crucial steps to take to achieve a particular goal. Ask yourself continually: what is the most direct, most appropriate, most doable, and/or the fastest and most effective way to achieve specific goals and objectives?

Following is a list of some key strategic considerations for launching an initiative.

- **Timing matters.** Determining the date and time you will make an announcement seems simple, however there are many factors you need to consider.

  - *What are dates and times of year to avoid?* Be careful to ensure that the date doesn't conflict with another major public event; national, state, or religious holiday; and doesn't fall in the doldrums of summer or too close to the date or aftermath of an election.

  - *What days of the week are best for the media?* Hosting events earlier in a week is typically better as it gives media outlets a chance to follow up and for people to promote stories on social media throughout the week. Friday is a particularly bad day. Saturday papers tend to have fewer stories, and if it is not covered on Friday, any follow-up and social media will likely get little play over the weekend. Mondays can be excellent days to announce new initiatives, as reporters' calendars are often uncluttered except for early morning planning meetings. But Monday can be tricky because it requires securing interest well in advance of the weekend. Scheduling on Wednesdays is often the best time to host events, as you have the early part of the week to build interest and remind reporters of the event as well as enough time for media follow-up and social media reporting.

  - *What times of day should I schedule the event?*
    - Key audiences who are working during the day also have to take lunch, so scheduling in-person events from noon to 1:30 PM often works well. People are more likely to come to a lunchtime event if you also provide it. For the same reason, if the event is online, it is often best to hold it before lunch (11 AM) or immediately afterwards (1 PM). Make adjustments for time zones, particularly if you are hoping to get coverage of national or trade press from a different zone. Some coverage, such as Zoom, can be recorded so if there is a celebration in the evening, you might consider sending out a recording to media first thing the next morning.

    - Newspaper deadlines are late in the afternoon, so it is best to schedule events before 1 or 2 PM to give them time to write about it.

    - Local news broadcasts are typically scheduled at 6 to 7 PM and 11 PM. If you must do an event at night, consider inviting a prominent news anchor to serve as an emcee or speaker and encourage them to discuss the event on their broadcast. You also can seek to place a key spokesperson on your local broadcast stations' morning talk shows.

  - *When are your must-have speakers available?* Sometimes it can come down to when your biggest donor or media draw is available.

  - *How do I keep the launch alive beyond the initial announcement?* It is often helpful to think of the launch as not just a single event on a single day, but rather a series of activities to help your initiative build momentum.

- **Piggybacking on your own (or other organizations') events.** Often leaders schedule announcements to coincide with other events that are important to their organization or a coalition they lead. This approach makes sense because often many key leaders and staff are already available. However, media may not be interested in navigating a larger event to get a story on one particular issue, or may focus on some other aspect of the event. You may be better served by keeping the launch as a separate event. Even high-profile, prescheduled events might not result in the best coverage. For example, a governor might want to announce the initiative as part of the State of the State address. While this indicates important support for the initiative, D4AD might get lost among all the other higher-profile announcements that are part of the same speech.

- **It's about the people.** Remember that the tools and resources you have been building for months are not the story. The story is how those tools and resources will make a difference in people's lives. As such, announcements and events should be oriented toward the voices and experiences of those people and communities.

- **You aren't throwing a surprise party.** While Apple may carefully guard information about the coolest new gadget they are releasing before the announcement, this is not the case here. You will want to seed as much information as possible prior to the announcement. Making sure tools and resources are well-tested and fully operational so you can demonstrate them and ideally have people who have already used the tool will be important. You will also want to ensure that partners and other organizations you are engaging are fully briefed and available. Doing advance work with media outlets will help prime their interest in covering the announcement, and using social media to put out teasers of the upcoming announcement can pique interest.

- **Multiple audiences deserve multiple channels.** Remember that various audiences will learn about your initiative in different ways. Not everyone reads the local newspaper, watches or listens to local news, or uses social media. Think carefully about which audiences you are trying to reach and what will be the best channel to reach them on. Think as well about ways that you can reach your audience more than once through a variety of outlets.

With these considerations in mind, let's look at possible launch activities and approaches that you might incorporate into the public announcement of your initiative.

LAUNCH ACTIVITIES AND APPROACHES

You will develop specific goals for your initiative's launch, but in general the goal is to gain as much visibility as possible. Note we did not say gain as much public media coverage as possible. Media coverage is very important but raising visibility can be done in a variety of ways, some general and public and others targeted and not necessarily in the public's eye. This is also why we suggest thinking in terms of a "launch month" (or a several-week period) rather than a launch day. Below are ideas for activities and approaches arranged around potential audiences you will want to reach along with a note about social media. We have discussed audiences throughout this document, but here we are focused specifically on what can be done with those audiences around the actual launch.

Engaging the Media

Creating an event that makes a big splash requires finding the right venue where low-income, low-skilled, unemployed, or underemployed workers are present, framing the event to carry desired messages, releasing newsworthy information about unemployment or the job market, and other means of gathering interest. *See sample news release and agenda.*

Focal point and venues

- Consider hosting a **launch event at an actual job center site** where you can demonstrate the tools and resources and give reporters an opportunity to speak with caseworkers and jobseekers.

- If you are running a statewide initiative, consider hosting **events at multiple sites.** The announcement can be livestreamed and reporters can talk to individuals at their local job site. Having a visual, people-oriented event such as this is your best strategy to engage local television media.

- **Sponsor a larger event** where your initiative plays a central role. For example, you may host a major job fair with dozens of employers, community organizations, and other support agencies all in one place. Your information, training opportunities, or your new tools and other resources connected to your initiative, are prominently displayed, and you would control the message to media. The fair becomes a visual representation of what your new tools and resources do— bring together workers and jobseekers with all of the resources they need in one place.

- Host an event at a **major business or industry site** if you are to announce D4AD goals to fill so many new jobs with low-income, low-skilled, unemployed and underemployed workers by a certain date.

- Consider hosting a **media briefing** (in person and via conference call or Zoom) if an onsite launch is not possible (or if you want to supplement a single location on-site announcement). Make sure to include an interesting mix of speakers (an initiative rep, a worker, a community partner, etc.), make presentations short, provide time for questions and answers, and offer to connect reporters with others they might want to interview about the initiative.

Media materials

- Prepare **background materials** that clearly demonstrate the need for your initiative and the benefits it can provide to workers, employers and the state as a whole. Fact sheets with clear data points and visuals are useful in helping the media tell the story.

- Prepare **launch-related press materials** (press advisory, press release, website and social media materials, etc.) but don't rely only on these. Reporters are inundated with these materials, most which come across the wire with little or no human touch. This is a critical launch for your initiative, so it is important to reach out directly to as many key media contacts as possible with a personal email or phone call.

Op-eds and commentaries

- **Develop and place op-eds for daily newspapers, and commentaries for trade publications,** bylined by an influential policymaker, community or business leader, or small combination of authors, about the need for the initiative, to appear around the time of the launch. See the D4AD Commentary Starter Kit for ideas.

- Set up **editorial board meetings** to explain the importance of strengthened workforce development strategies and systems to address the needs of low-income, lower-skilled, unemployed and underemployed workers in your state, region, or city. During the session, present how the initiative will address some of the challenges workers and workforce systems face and what you need others to do to support the effort. Be sure to leave plenty of time for editorial page writers to ask questions.

Event materials

- Ensure your event is as well-planned as possible by **creating an event run-of-show**, a minute-by-minute schedule of what will happen that is shared with all meeting organizers and participants. This will help participants stay on task and allow you to better inform media and others about what will happen when.

- Also make sure your event stays on message by **preparing an event script and talking points** for speakers. Your speakers will obviously deliver their own messages, but providing a script and talking points will allow you to show speakers what you see as priorities for them to cover and how their message fits into the larger event.

- For your audience, **create an event agenda with** times and speakers so they know what to expect. This, along with your event script, will help ensure that the event stays on schedule and doesn't drag on and lose the audience's interest.

- As a takeaway for those who attend (as well as those who were not able to attend, but would like information) **create an initiative backgrounder or brochure** that outlines the basics about your initiative, including:
  - what the initiative seeks to do;
  - who it serves;
  - why it matters; and,
  - when, where, and how to access tools, resources, and services.

- If you intend to promote your event and your initiative via social media, make sure to **include an easy to use hashtag** on your event materials as a suggestion for participants to use.

A NOTE ABOUT SOCIAL MEDIA

Social media can be a powerful tool for raising visibility, engaging a diverse set of audiences, and sharing information. It can also be a drain on your limited capacity with little return if not used strategically. The following general recommendations are made with the understanding that your initiative's ability to use social media will be dependent on capacity as well as your organization's preexisting social media policies.

- **Create separate social media accounts for your initiative.** Your organization may already have social media accounts that can be used to amplify the initiative, but the goal here is to focus engagement specifically on your initiative and not have it lost as one of many things your organization does. In addition, partners may be more willing to follow and promote your initiative's social media content than your organization as a whole.

- **Identify who you want to connect with and prioritize those social media platforms.** You don't need to be on every social media platform. Perhaps your priority is to reach media and policymakers and when you look at those groups' social media activity you realize it is limited to Facebook and Twitter. Then there is no need to be on SnapChat and Instagram. But perhaps, you also want to reach a particular demographic of worker and you know they use Instagram regularly. Then you might consider an account on that platform as well.

- **Use social media platforms for the audience(s) you are trying to reach and make sure they will use it for this purpose.** Don't post the same thing on every social media platform, particularly if you have different audiences you are trying to reach on different platforms. Post relevant information for that audience. Also ensure that even if you know a particular audience is on a particular social media platform they will see the platform as a space to hear from your initiative. A worker might use Twitter regularly, but only for personal interactions and not as an information source about employment.

- **Follow to be followed.** Social media is about engagement and reciprocity. You can't expect individuals or organizations to follow you and promote your content if you do not do the same for them. Prior to the launch it will be important to establish some social media presences and build a following so the audience will be primed to promote the launch when it occurs.

- **Maintain your social media network.** Too often organizations put initial effort into social media and then fail to maintain that work. Social media accounts should be maintained both with posts and by monitoring who you are following and who is following you. Monitoring is an important way to gauge who is paying attention to your work. It can be time consuming, but will be invaluable for maintaining momentum for your initiative.

The following is a quick list of do's and don'ts for social media engagement.

DO'S	DON'TS
• Consider the source—posts from individuals who have little influence do not warrant responses.	• Overreact in quick responses to posts which can result in online debating.
• Remember that posts or responses to other posts are for your wider audience as much as they are aimed at a particular group or individual.	• Engage "trolls" or individuals who are merely attempting to create controversy or online arguments.
• Be thoughtful and honest—never be knee-jerk in social media posts and always take questions and concerns seriously.	• Engage in ad hominin attacks—always maintain a civil and concerned tone.
• Correct false information, but just stick to the facts.	• Over share. Too many responses to criticisms or online attacks will simply elevate the issue.
• Be transparent—don't try to obfuscate an issue (if you cannot respond for legal or privacy reasons, say so).	• Treat all social media platforms the same. Match the content of your post to the platform.
• Always try to show the benefits of your initiative—often when a controversy arises, it is helpful to post information about the benefits rather than just responding to opposing views.	• Don't transfer a controversy from one platform to another. If a scenario is being debated on Twitter, don't cross-post to Facebook and start the conversation there unless it is to the benefit of the organization.
• Promote posts and comments from supporters.	• Delete comments or posts because they are negative—show a willingness to allow for opposing viewpoints.
• Seek third-party validators who can respond to criticisms on your behalf and promote the benefits of your initiative.	• Rely on individuals within the organization to respond to crisis scenarios rather than having a consistent organizational message.

Engaging Community Organizations

The following activities and approaches can be used leading up to the launch and for the launch period itself.

- Well before the launch period **build relationships with potential community partners.** Ideally that will be partners in the launch, but you also do not want organizations who feel they do important work in this area to feel uninformed or excluded, even if they are not active partners.

- **Engage community partners in planning and launching the initiative.** Having influential community leaders as spokespeople for the initiative provides you with valuable third-party validators and expands your reach.

- Offer to **provide orientation and training to community organization leaders and staff** to ensure they understand the tools and resources and what types of workers and jobseekers you are looking to serve. This will help your partners have the information they need to spread the word.

- Provide your partners with **visibility materials** such as fliers and posters as well as digital images they can use on websites or social media to advertise the initiative.

Engaging Employers

The following activities and approaches can be used leading up to the launch and for the launch period itself.

- **Identify influential business and industry leaders and involve them in the launch** activities. Whether as speakers or invited guests, having employers involved in the launch sends a clear message that your initiative seeks to engage, and is connected to, the whole workforce system.

- **Invite employers to a demonstration of the new tools and resources,** encourage their feedback and develop connections for follow up.

- Seek out **speaking opportunities at business leader gatherings** such local Chamber of Commerce meetings, Rotary meetings, or industry council advisory meetings at local community colleges.

Engaging Policymakers

The following activities and approaches can be used leading up to the launch and for the launch period itself.

- Prior to the launch, **develop a legislative landscape** that identifies key leaders, committee chairs, members of committees who may have oversight or funding responsibilities that could impact your initiative, and members with job centers in their districts or with populations that would benefit from the initiative. Having a lay of the legislative land will help determine who to communicate with and when.

- Based on your assessment, **invite legislative leaders to participate or attend launch events.** As noted above, you will need to determine if involving a politician in an event will provide you with better visibility or if the event will end up focusing on other issues the politician raises. Regardless of whether or not legislators are participating in the event, you should ensure that they are aware of any event occurring in their district.

- To ensure legislators are informed and to encourage their support, **hold legislative briefings** with legislative staff early during the launch period.

By the end of the launch period, you want to be able to determine that you have been as visible as possible, engaged as many partners as you could, and laid the groundwork for support of the initiative. A key measure of your success will be the list of tasks that need to be done as follow-up whether that is contacting other people and organizations that were recommended to you for outreach, fulfilling material or information requests, or even making suggested changes to your tools and resources. These requests all represent engagement, and engagement is the key to maintaining momentum for your initiative.

MAINTAINING MOMENTUM

If communications efforts and campaigns often suffer from a lack of planning, they more often suffer from lack of follow-up after a major event. But immediately following a major event or series of events is one of the best times to engage partners, garner additional support, and gain more visibility. Things to keep in mind as you enter this phase:

- **Celebrate successes.** You have just put in a tremendous amount of work to plan your initiative, build and implement important and valuable new tools and resources for the vulnerable workers you serve, and to launch your initiative. Make sure to celebrate your work and acknowledge the efforts of your team, champions, and allies.

- **Remember you are still (and always) launching.** Launching is about raising visibility, sharing information, gathering support, and working to ensure the success of your initiative. Those goals remain constant and ongoing although your strategies and tactics most likely will change as you enter into a more retail phase of your campaign.

- **Now is the time to assess and adapt.** This is a prime opportunity to assess how effective your strategies and tactics were in reaching your near-term goals and whether or not they will serve you well in reaching your long-term goals. An honest assessment and adaption where necessary is a valuable process at this point in the campaign.

- **You still need a plan.** Not only should you assess how effective your strategies and tactics were, you should revisit your entire communications plan and revise it based on your current level of success, what your goals and objectives are moving forward, and what you have learned about your audiences and partners. Having a plan in place also helps keep your team focused on the work ahead.

Finally, make sure to provide D4AD's implementation partners with feedback on what you have learned so far, resources and supports you could have or still could use, and strategies that other initiatives may find effective or want to avoid.
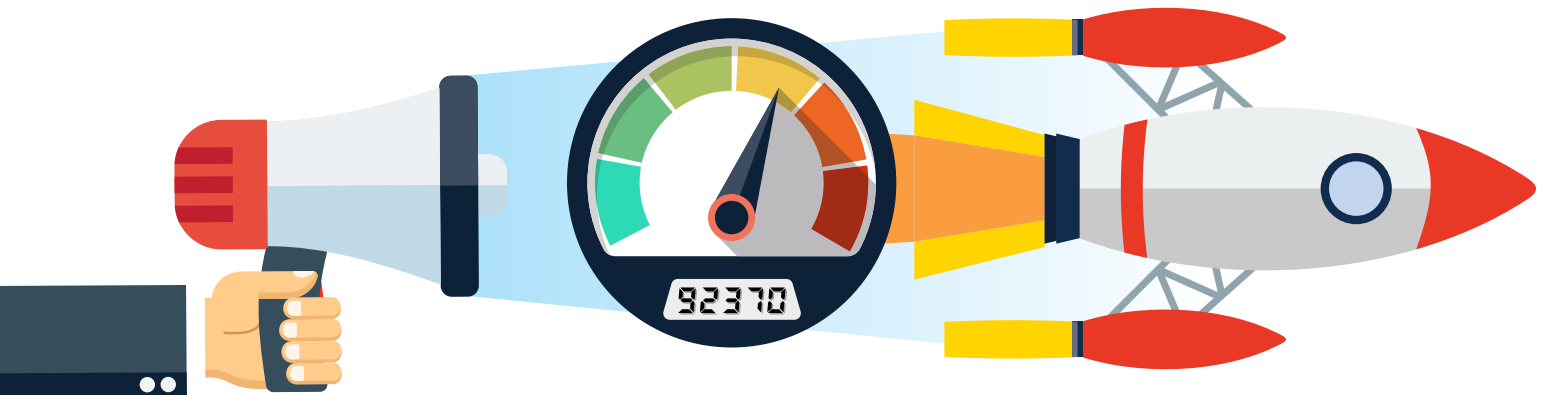
APPENDIX A: Developing Your Communication Goals and Objectives

Developing a plan starts with articulating clear, concise, and measurable goals that are appropriate for your target audiences and are aligned with desired outcomes of your overall initiative. The following questions can help identify the clarity and strength of your goals.

• Are the goals clear and concrete?

• Are they aligned with the overall purpose of the productivity initiative?

• Are they realistic?

• Can you build a strategy around them?

• Will othergroups embrace them or are they too self-serving?

• Do they encourage new approaches and outreach to new audiences or "business as usual?"

• Are they measurable?

To focus your goals, you should consider the three to five distinct areas of communications-related work that your initiative needs to pursue. Possible areas include: engaging low-income, lower-skilled unemployed, underemployed workers; developing partnerships with community organizations; garnering legislative support; raising visibility for the initiative in the workforce development field; building support for changes in policy and practice for long-term improvements in serving this population; or others.

Your plan also should consider what success looks like for each goal, and identify key objectives to be accomplished. Possible indicators include:

• Change in attitudes and opinions, as measured by opinion research;

• Increased referrals from community partners;

• Successful changes in legislation or agency policy to support the developments put forward by your initiative;

• Increased budget appropriations to support the initiative;

• Requests for information about the initiative from other states and organizations; or,

• Increased media coverage focused on workforce issues, in particular issues related to low-income, lower-skilled, unemployed, and underemployed workers.

There are also qualitative indicators that demonstrate sustainability and momentum, such as evidence of:

• Strong policymaker leadership, as measured by public statements and actions;

• Community leaders taking action to improve outreach to key constituencies;

• Leaders from business and other sectors supporting your efforts in substantive ways; and

• An active and powerful base of allies and champions.

The next step is to refine your goals and add information about progress/success measures. The table below is designed to help you do that.

COMMUNICATIONS GOALS	INDICATORS OF SUCCESS
EXAMPLE / Goal 1 Raising Visibility for your D4AD Initiative	• Recognition by policymakers and influencers that addressing the needs of low-income, lower-skilled, unemployed, and underemployed workers is necessary and beneficial to the state. • Increase in the number of partnerships between community organizations, employers, and state agencies. • Significant or increased media coverage about key issues related to workforce development and other supports for vulnerable workers. • Interest in your initiative from other organizations and states. • Increased dialogue among business and industry leaders in your region or state about the benefits of this new approach. • Additional funding for your initiative as a result of visibility and interest.
Goal 2	
Goal 3	
Goal 4	

D4AD | NCHEMS

APPENDIX B: Addressing Challenges and Leveraging Opportunities

An effective approach for completing an environmental scan is to identify the:

• challenges your initiative may face and possible solutions to those challenges

• opportunities your initiative may have to build buy-in and support, and strategies to capitalize on those opportunities.

Below are two tables to help complete the scan. We recommend these be completed together, as often challenges you may face also present opportunities. Together, these will help you develop strategies and tactics for achieving your initiative's goals.

Addressing Challenges

Challenges can come in all shapes and sizes, but here we are specifically focused on communication challenges. It is useful to first try to brainstorm all of the challenges you may face, see where challenges may overlap or connect with other challenges, and to organize and prioritize them. You may want to consider the following general questions to help you generate your list.

• Are there communications challenges that particular audiences will pose (hard to reach, trust issues, language barriers, etc.)?

• Are there key audiences from whom it will be hard to gain support that require special attention due to their position, influence, or importance to reaching the goals of your initiative?

• Are there political challenges that will require particular types of communications and outreach to solve?

• Are there technology challenges that will make communication efforts more difficult?

• Are there funding and support issues that will require specific communication efforts?

Once you have identified and organized the challenges, use the following table to generate possible solutions to each challenge.

CHALLENGE	POSSIBLE SOLUTIONS
EXAMPLE / Challenge 1 Many of the workers the initiative aims to help are distrustful or don't see the benefits of workforce development services.	• Enlist community organizations that are trusted by target groups and/or function as intermediaries. • Seek out publications and meeting spaces where materials can be placed in settings where they are likely to be seen, trusted and acted upon by targeted groups. • Ensure all materials demonstrate an awareness of workers' situations and focus on the concrete benefits to them. • Identify workers who have benefitted and engage them as ambassadors for the initiative.
Challenge 2	
Challenge 3	

Leveraging Opportunities

Equally important to identifying the challenges is identifying opportunities. In fact, too often campaigns only focus on challenges and don't take advantage of opportunities they have to increase buy-in and support and make their efforts more successful. Likewise, issues that are seen as challenges are often overlooked as opportunities. For example, COVID-19 is an obvious challenge given its impact on the economy, but it might also be seen as an opportunity since it is placing more focus on the need to support workers and jobseekers. Here again, thinking about a few key questions can help you identify those opportunities.

• Who are the existing supporters and potential supporters who would be influential in building support for your initiative among your target audiences?

• Are there influential businesses and industries (or new businesses) that could become partners which would then be influential supporters?

• Are there community organizations that have deep connections with the workers your initiative is seeking to reach that could become important partners?

• Are there other federal, state or local initiatives/funds that would be beneficial to connect with?

• Is there research that supports your initiative's goals and objectives that would be persuasive to those you seek to reach/influence?

Here again it is useful to brainstorm all of the potential opportunities, organize and prioritize these, and then use the following table to generate possible strategies to capitalize on those opportunities.

OPPORTUNITY	WAYS TO CAPITALIZE
EXAMPLE / Opportunity 1 Recent elections have put a significant number of new legislators in the state's assembly and senate.	• Develop materials that demonstrate the challenges with the current workforce system and how your initiative is more efficient and effective and use these to educate new legislators. • Identify how the initiative will help workers in members' districts with data specific to their district. • Offer to organize and hold joint events in districts to demonstrate members' commitment to better jobs and careers and to promote the initiative.
Opportunity 2	
Opportunity 3	

APPENDIX C: Analyzing Audiences

There are several ways to think about and analyze the audiences you want to reach or with whom you will be engaging, whether they are an audience you are targeting or not. Below are two tools to help you with that process.

1. Audience Needs, Concerns and Actions Analysis

2. Audience Value and Risk Analysis.

Audience Needs, Concerns and Actions Analysis

The following table was developed as part of an audience mapping process for the overall D4AD initiative. You can use this table as a starting point to discuss who you see as your potential audiences for communications, what the needs and concerns of these audiences are, and what the potential for action might be with these groups in relation to your initiative. You may also want to break these audiences down into more specific audiences and/or add additional audiences to the list.

AUDIENCE NEEDS AND CONCERNS	DESIRED ACTION

Workers
 	
• Diverse group of individuals with varying social, cultural, and economic situations and needs. Some are:
 	
  • seeking immediate employment to address pressing economic needs.
 	
  • seeking better employment options with long-term potential and advancement.
 	
  • looking for assistance navigating employment and training options in a crowded field of information, with some having few or no skills for using tools such as those being developed.
 	
  • lack of time to look for work and experience in finding jobs.
 	
  • perceive themselves as failures and are often seen as unstable "job hoppers" when their job situations are out of their control. They face significant barriers to working, including childcare and transportation needs, language barriers, and may need to make cultural adjustments to fit into the workplace.
 	
  • looking for efficient and economical options to pursue/improve employment situations (not processes that take months and are costly).
 	
  • unsure how to assess the quality of information they are receiving and generally mistrust institutions and data; hesitant or even unwilling to share data due to fears it will not be protected or could be used in negative ways against them.
 	
  • rarely have luxury to think about own aspirations or potential for careers.
 	
  • lack the confidence to enter into the process of formal assistance in their job search.
	• The primary goal for workers is to get them to use the new data systems and tools to find employment, training, and additional education, and improve their long-term career options.
	
	• A secondary goal would be to get them to promote the initiative informally and in ideal circumstances serve as ambassadors who are willing to have their story told, their image used, and even be willing to speak publicly about their experience.
	
	This is a large, diverse group which means:
	
	• efforts will need to be segmented by groups, including those who are already participating in existing institutional structures and those who are outside of the system.
	
	• messages will need to be customized to address different groups of workers.

AUDIENCE NEEDS AND CONCERNS	DESIRED ACTION
State Policymakers • Seeking solutions to develop a better-educated and trained workforce to meet state needs. • Always seeking solutions that are economical, budget neutral, for the state. • Want concrete products and services they can share with their constituents. • Concerned when constituents complain about bureaucratic services and red-tape that prevents them from getting the information and services they need. • Risk-adverse, so may have concerns about data sharing and privacy.	• Be aware of the initiative work in their state and support the work to help raise awareness in the state and with their constituents. • Share what they are learning with policymakers in other states. • Support long-term investment in the system through state funding.
Federal Policymakers • Looking for model programs they can pilot or incentivize through policy. • Generally prefer states to take the lead in addressing education, training, and workforce needs. • Risk-adverse, so may have concerns about data sharing and privacy.	D4AD is primarily a state-driven initiative, but still can have an impact at the federal level, and individual initiatives may benefit from support of their own members of Congress. • Learn about the initiative in general, and the particular work in the grantee states. • Look for ways in which federal policy can support (or not hinder) the implementation of data systems and tools such as those being tried in the D4AD initiative, and incentivize workers to use these systems and tools.
Education Professionals • Seeking credible, accessible tools and resources to help students (including working students) identify good career pathways to transition from education to employment. • Often working with large classes and advising caseloads, so are looking for tools and resources that are effective and easy to implement. • Often operating within their own institutions and disconnected from workforce agencies, employers, and the business communities, they would benefit from tools that provide better connections with agencies and networks outside of their institution(s).	• Incorporate the use of new tools and resources into student advising process. • Become part of a statewide network sharing information and feedback on tools and effective strategies for assisting future workers.

AUDIENCE NEEDS AND CONCERNS	DESIRED ACTION
Workforce Training Professionals • In need of easy-to-use tools that can help low-income workers navigate potential employment opportunities and career pathways. • Often dealing with large caseloads and time pressures that can make it hard to devote time to workers who need the most assistance. • Would benefit from more comprehensive information on low-income workers in their state, and effective strategies for reaching those outside, or on the margins of, existing institutional structures. • Need for better connection with employers to increase ability to match potential workers with opportunities.	• Incorporate the use of new tools and resources into work with low-income workers. • Provide feedback on the effectiveness and efficiency of new tools and resources. • Develop improved strategies for reaching and serving low-income workers with the greatest needs. • Create better connection with employers to ensure they see the benefits of new tools.
Employers and Industry Groups • Seeking trained workers to fill immediate needs and ongoing training to maintain a skilled workforce. • Looking to lower cost of recruiting and retaining workers. • Generally supportive of public/private partnerships to strengthen the workforce and economy.	• Support the efforts of states to develop a system that will not only benefit workers but also will strengthen the workforce and local business and industry. • Promote the data tools and systems to employers in their networks. • Commit to working with the state to hire and support more of the most in need, low-income workers.
Community Organizations • Seeking to strengthen members and families in the communities they serve. • Interested in initiatives that might supplement lessons learned from their own projects. • Looking for projects and organizations they might connect with to promote their own work. • Seeking additional funding.	While these organizations may have differing connecting points (career pathways vs. workforce development, data sharing, etc.) there may be opportunities to connect with these organizations that could: • Serve as intermediaries for the initiative and expand outreach into the communities they serve. • Feature the initiative's work in organizational materials or at meetings. • Develop additional ideas that would strengthen the initiative.
Media • Trade press looking for new initiatives in the education and workforce areas that are succeeding where others have failed. • Regional media looking for stories that have direct impact in their readership area. • Generally looking for stories that have a human impact. • Drawn to well-known, influential figures.	• Cover initiative regularly. • Seek out initiative leaders as experts and resources on workforce development and serving low-income, lower-skilled, unemployed, and underemployed workers. • Follow and elevate initiative's social media work.

D4AD | NCHEMS

Audience Value and Risk Analysis

The following table is designed to help assess the pluses and minuses associated with the key audiences for your efforts. This is an important part of the process, as it helps you identify the issues that you will need to be prepared to address, and can help identify how particular audiences should—and should not—be engaged. You may not see the need to assess the value and risk for every audience you identify, but doing so is a useful exercise as it will often bring to light concerns and opportunities that the previous exercise did not.

AUDIENCE	ADDED VALUE	POTENTIAL RISKS
EXAMPLE: Business Leaders	Strengthens initiative by: • Provide initiative with significant help reaching particular industries. • Serving as powerful allies with legislature.	Could harm initiative if leaders: • See the initiative as increased bureaucracy and oversight and actively work against it.
EXAMPLE: Rural Workers	Strengthens initiative by: • Demonstrating the initiative is not just focused on urban centers. • Addressing large parts of state that have significant need. • Engaging employers in rural areas as well. • Gaining support of legislators who represent rural districts and tend to be fiscally conservative.	Could harm initiative if workers: • Feel the initiative is approaching if their needs and perspectives as homogenous and predictable. • Don't believe their needs are being met and see the initiative as disingenuous, manipulative or exploitative.
Audience	•	•
Audience	•	•

APPENDIX D: Developing Smart Strategies and Tactics

Strategies are the critical link between your goals and measurable outcomes. Just as the choice of tools can make or break a construction project, choosing the right strategies can mean the difference between meeting your goals and falling short – or worse. Strategies must be animated by smart tactics – individual activities that, taken together, advance a key objective of the initiative. Strategies and tactics will be unique to your particular initiative and context, but below are some suggested types of strategies and tactics to consider as you put together your plan.

STRATEGY TYPE	POSSIBLE TACTICS
Grassroots Strategy: Mobilize workers, advocates, and community leaders to raise awareness about the importance of the initiative, promote the tools and resources, and advocate for policies and practices that align with and support the initiative.	• Hold focus groups with workers and jobseekers to better understand their needs, how they use tools, and develop buy-in. • Develop human interest stories of workers and jobseekers that can be used in marketing materials, op-eds, and presentations, to put a human face on the initiative. • Develop ambassadors—workers who have benefitted from the initiative and advocates who have seen the benefits—to promote the initiative. • Structure rollout events to engage as many workers as possible, such as job fairs, demonstrations at community events, contests with valued giveaways for workers who sign up, etc.
Community Outreach and Engagement Strategy: Develop partnerships with community organizations to align initiative's goals and objectives with other organizations aimed at improving the lives of low-income, lower-skilled, unemployed, and underemployed workers, their families, and the communities within which they live.	• Hold open houses with community organizations to learn about their work and share information about the initiative. • Spotlight work of community organizations in materials to develop reciprocal relationships. • Provide ready-to-use materials that community organizations can place in publications, on websites, or in their physical spaces, to help spread the word. • Identify and engage influential community leaders to speak on behalf of the initiative.

STRATEGY TYPE	POSSIBLE TACTICS
Research Strategy: Develop new knowledge to inform policymakers and the public of the need for more strategic and streamlined workforce development systems that provide accessible, actionable, information, tools and resources to workers and jobseekers—particularly those who are low-income, lower-skilled, unemployed, and underemployed.	• Use research developed by D4AD to create brief materials specific to your initiative. • Engage outside researchers in your area to assess different aspects of the challenges facing the target population or local workforce development efforts, to support the need for the initiative.
Legislative Strategy: Through information, advocacy, and lobbying (if possible in your situation), advance strategic changes in laws and regulations governing workforce development and seek continued/increased funding.	• Develop research that specifically demonstrates how the initiative addresses concerns policymakers will have (e.g., fiscal responsibility, lower unemployment, increased income for constituents, etc.). • Create simple summaries, by legislative district, of who the initiative aims to help. • Hold legislative briefings on the initiative aimed at legislative staff also including workers and community organizations. • Develop specific list of policy changes that would support the initiative and strengthen workforce development.
Media Strategy: Use new research and data, high visibility leaders and organizations, worker and business success stories, and other collateral materials to draw media attention to the initiatives.	• Build relationships with reporters, editors, and outlets through informal meetings prior to pitching any stories. • Develop a bank of op-eds and commentary pieces by various authors that can be pitched over the life cycle of the campaign. • Develop a bank of different spokespeople who can be called on for interviews—workers, employers, community leaders, etc.
Internet/Social Networking Strategy: Use digital tools and social media to create dialogue, build community, share information, and spark action.	• Identify what platforms are used most regularly by audiences you want to engage. • Build a list of influencers (organizations and individuals) you want to reach and follow them on appropriate platforms as well as promote their work when appropriate to develop reciprocity. • Share content regularly.

Use the following table to help you outline your Strategies and Tactics. Start by filling in your Goals and Objectives and then building out your strategies and tactics for each one. You will also want to identify how you will measure the success of your strategies and tactics and then revisit this tool regularly to see what adjustments are needed.

GOALS AND OBJECTIVES	STRATEGIES	TACTICS	MEASURE OF SUCCESS
EXAMPLE **Goal:** engage more adults between the ages of 18-25 with the workforce development system. **Objective:** reach more young men of color in urban centers.	• Hold focus groups with workers and jobseekers to better understand their needs, how they use tools, and develop buy-in. • Develop human interest stories of workers and jobseekers that can be used in marketing materials, op-eds, and presentations, to put a human face on the initiative. • Develop ambassadors—workers who have benefitted from the initiative and advocates who have seen the benefits—to promote the initiative. • Structure rollout events to engage as many workers as possible, such as job fairs, demonstrations at community events, contests with valued giveaways for workers who sign up, etc.	Engage [three community organizations] that regularly work with young men of color in [city 1 and city 2] to increase outreach. • Set up meetings with each organization to identify strategies for working together. • Provide 2-page info sheet for distribution. • Create text that can used on website and in newsletters for targeted audience(s).	• X number of referrals from each organization. • X percentage of increased contacts from two urban centers. • X percentage increase of education, training, or job placements.
Goal 2:			
Goal 3:			
Goal 4:			

Once you've completed this chart, ask some tough questions: Are these in alignment? Are there gaps? Will the strategies and tactics be robust enough to help achieve the communications goals? Which of the strategies and tactics will be most efficient and effective? Do you have the capacity to deliver?

D4AD | NCHEMS

APPENDIX E: Assessing Your Resources

Use the chart below to indicate the resources that are available to you either in-house or externally. We have filled in several examples of resources you may need based on the types of communications and outreach you will be doing, but there will be several others based on your particular initiative.

RESOURCE NEED	INTERNAL Identify who or what	EXTERNAL Identify who or what
Community Organization Outreach		
Media Outreach		
Digital Outreach and Social Media Support		

RESOURCE NEED	INTERNAL Identify who or what	EXTERNAL Identify who or what
Legislative/Policymaker Outreach		
Material Production / Writing		
Material Production / Design		
Other Needs		

D4AD | NCHEMS

D4AD