

Has this ever happened to you?

- You carefully craft a message about your United Way’s transformation to community impact and send it to your target audiences—and realize later that it wasn’t read and understood.
- When talking about your work, you use the same language with the media that you and your staff use when talking to each other—and then you wonder why people don’t seem to understand what it is you REALLY do.
- You’re so busy communicating with your external audiences about your transformation to community impact that you forget to bring your staff along on the journey.

A communications plan can help you avoid repeating these mistakes. Especially when your United Way is doing an “extreme makeover” from a transaction-based fundraiser to a relationship-based community impact leader, you need to be clear and consistent about how and why the changes are occurring—and what they’re going to mean for your community.

Community impact is hard work. A simple communications plan can make it a little easier to talk about.

This guide stresses the importance of identifying the communication’s **purpose**, your **target audiences** for a round of communications, defining your communications **objectives** for each audience, focusing on **key messages** that will help achieve those objectives, and implementing the **tactics** that will ensure that messages are delivered effectively to each audience. It also provides guidance on how to maintain ongoing communications about your progress.

The guide is intended for United Ways that are engaging in community impact work. *It is not a new way of communicating United Way’s traditional transaction-based work.* The sample template provides a tool you can use over and over as your communications objectives evolve—first as you declare your shift to community impact, later when you describe your first focus areas, announce a new initiative or steer media away from focusing only on a financial goal.

Remember, to be effective, communication must be year-round and based on explicit objectives. This guide can help you meet those criteria. It offers practical suggestions for creating a communications plan and gives additional ideas for communicating specifically that your United Way is moving to community impact. We’ve included links to several online resources for additional information.

## DEVELOPING A COMMUNICATIONS PLAN

Certain steps are needed to create a sound communications plan for a particular activity, stage of work, or accomplishment.

### 1. Determine the purpose of your communication.

What is it your goal in communicating? What do you want your audience to know, believe, say or do once they have received this communication?

### 2. Convene a small, cross-functional group to shape your communications plan.

“Cross-functional” is key. Community Impact, Resource Development and Marketing/Communications staff and volunteers all have critical roles to play in developing and implementing an effective communications plan. Success will require the perspectives and expertise of multiple functional areas.

### 3. Identify your target audience.

Once you have determined the purpose of your communication, you will need to think carefully about the target audience. A “target audience” is a specific individual or group that you want this communication to influence. While it might be ideal for everyone in the community to understand what you are doing, the reality is that limited resources require you to focus on those whose understanding, support and contributions will be essential to the success of your efforts. The specific activity, effort, stage of work, or accomplishment that is the subject of the communication will determine the right audience.

For a particular communication you may have one or several target audiences.

Internal audiences include:

- Staff
- Board leadership
- Campaign leadership
- Other volunteer leadership
- Staff of collaborative efforts lead by United Way (e.g., some Volunteer Centers or 2-1-1)

External audiences include:

- Active Community Investors (\$500 or more to a local charity plus investment of time or expertise)
- Leadership givers
- Segmented donor groups (e.g., women, young leaders, ethnic groups)
- Community volunteers
- Collaborative partners

- Media
- Agency partners
- Other nonprofits in the community
- Corporate partners / major contributors
- Local, regional, state government partners
- Your state United Way organization
- United Way of America

**4. Set realistic objectives.**

When you’re communicating, you’re trying to influence your audience in some way. Objectives are the “so what?” of your communication.

A short-term objective may be for targeted audiences simply to know and understand your reasons for change, while your long-term goal is to influence their behavior—to persuade them to speak in favor of your

work, become a partner in a specific effort, invest money or other resources in a particular strategy, feature your community impact accomplishments in reports, etc. Obviously, you cannot expect people to support things they are not aware of or do not understand, and their receptivity may be based on relationships that are established over time. Your communication effort will be clearer and more effective if you think hard about the “so what?” of the communication—your long-term objective and what you want the audience to do as a result of this communication.

Recognize that even for the same audience, your objectives are likely to be different for different activities, stages of work, and accomplishments. Often you will have different objectives for different audiences which may require different messages and the use of different tactics. Being explicit about your immediate and long-term objectives will help you design messages focused on those objectives.

Target Audience	Tactics
Staff	<ul style="list-style-type: none"> <li>• CEO briefing</li> <li>• Staff meeting</li> <li>• Special training</li> <li>• In-service making use of examples and simulations</li> <li>• (See the Ogre Story at <a href="http://online.unitedway.org/ogre">http://online.unitedway.org/ogre</a> and Hometown Literacy Partnership Experience <a href="http://online.unitedway.org/hometown">http://online.unitedway.org/hometown</a>.)</li> </ul>
Key volunteers	<ul style="list-style-type: none"> <li>• One-on-one visit</li> <li>• Small-group dialogue</li> <li>• Focused discussion at Board meetings</li> <li>• Newsletter or other electronic communication (eg e-postcard)</li> </ul>
Agencies	<ul style="list-style-type: none"> <li>• Meeting with agency executive council</li> <li>• Meeting with agency board</li> <li>• Lunch meeting or other small-group meeting with multiple agency execs and board leaders</li> <li>• Presentation by agency representatives from other communities where United Ways have transformed</li> <li>• (For important considerations in communicating with agencies, see “But what about the member agencies? Redefining Agency Relationships for Community Impact” <a href="http://online.unitedway.org/redefineagency">http://online.unitedway.org/redefineagency</a> )</li> </ul>
Investors/potential investors	<ul style="list-style-type: none"> <li>• One-on-one calls in the “off season” to CEOs of companies that run campaigns</li> <li>• Information session for small groups, applying the techniques of consultative selling</li> <li>• Newsletter or other electronic communication (e.g. e-postcard)</li> <li>• Issue-briefing breakfast on particular topics for community investors who have demonstrated interest in that topic</li> <li>• “Issue updates” sent to community investors with interest in specific issues</li> <li>• Refocus the use of agency speakers during campaign presentations</li> </ul>
Media	<ul style="list-style-type: none"> <li>• Personal visit</li> <li>• Meeting with editorial board</li> <li>• Broadcast</li> <li>• Op/ed columns explaining the need for change</li> <li>• (see the resource from UW of Eastern Maine)</li> </ul>
General public	<ul style="list-style-type: none"> <li>• Press release</li> <li>• Press conference</li> <li>• Public service announcement</li> <li>• Placed media story</li> <li>• Scheduled interviews highlighting initiatives such as 2-1-1, Success By 6®, Earned Income Tax Credit and disaster response work to demonstrate community impact</li> <li>• Your website (featuring reports and updates)</li> <li>• Print newsletter, brochure, pledge card, annual report that supports impact messaging</li> <li>• Events both inside and outside campaign season</li> </ul>

## United Way's Target Audience

*United Way has identified its target audience as “Active Community Investors” —those people who are generous with both time and talent, giving at least \$500 a year to a local charity (not necessarily United Way) and also volunteering in the community. Research tells us that Active Community Investors are passionate about creating positive changes in their communities, and are more informed, more demanding and more results-oriented than the general public. If we communicate effectively with Active Community Investors about our goals and our progress, they’re more likely to support us and to recommend us to others. So when United Way of America is creating a communications plan, our first target audience is usually the Active Community Investors.*

### 5. Determine your key messages—the fewer, the better.

Messages need to relate directly to your objectives. Defining, refining and reiterating a few important points will help ensure that your audience stays focused on what really matters. Key messages that are clear, simply stated, concrete and to the point make it easier for your key spokespeople—whether staff or volunteers—to feel confident about using them in their own communications.

For a good example of this, take a look at the United Way “Communicating what matters<sup>®</sup>” message guide. You can find it at <http://online.unitedway.org/brand>. It models United Way’s key messages and how to use them effectively in a variety of communications.

The language you use can make or break your communications effort. Aim for shorter sentences and shorter paragraphs, and avoid jargon—especially United Way jargon! For help making sure you’re using the words and phrases that communicate United Way’s work most effectively to external audiences, check out “Language to Use... and Avoid” at <https://online.unitedway.org/site/uwaservices/brand/whatmatters/keymessage.cfm>

### 6. Decide on tactics.

Once you know “who?”, “what?” and “so what?”, the final question is “how?” Tactics are your methods for delivering the message to the audience. A communications tactic can be as simple as a conversation or as sophisticated as an interactive website. The challenge is to decide what method will be most successful in getting your key message to each target audience.

Following are a variety of communications tactics that have proven effective for United Ways.

### 7. Implement, monitor and adjust.

Capturing the elements of your plan in writing will help assure coordinated implementation. (See examples on following pages.) A complete plan will identify materials or information needed, relevant deadlines, and who is responsible for carrying out various tasks. The plan should note who, specifically, is accountable for carrying each task out and should be reviewed regularly and adjusted to reflect learnings.

## COMMUNICATIONS PLANNING: ANNOUNCING YOUR TRANSFORMATION TO COMMUNITY IMPACT

When planning a communications effort, there are generally three important phases to consider: pre-launch (when you’re laying the groundwork), launch (when you release the message) and post-launch (when you follow up and reinforce the message).

The following section provides an example including all three phases, with special attention to the pre-launch phase of communicating the change to community impact, as that is where much of the groundwork must be laid for future effectiveness.

Before you go public with your move to community impact, you will want to be sure that key stakeholders are ready to champion the transformation when United Way is making the case for change. Every staff member, from the CEO to the receptionist, has a significant role to play in the transition to community impact. Communicating with staff as early and as often as possible is critically important.

Key volunteers (including the chairs of marketing, campaign and community investment committees, as well as other influential board members) need a deep understanding of the issues and key messages because they must be prepared to discuss the reasons for change with external stakeholders. (For help in making the case, see: *The Road to Community Impact: Changing Direction* <http://online.unitedway.org/changingdirection>)

Before any formal public announcement of the change, the communication effort focuses heavily on personal, high-touch tactics with the United Way staff and board. An effective method of delivery for external audiences in the pre-launch stage is small group conversations, with United Way staff and board members conveying carefully crafted messages to key partners. Once key staff, key volunteers and key partners have been exposed to the pre-launch message, there should be targeted outreach to other stakeholders before the public launch. Other groups include civic organizations, beneficiaries, other United Ways and United Way of America.

Because the media plays such an important role in successful community impact initiatives, they should be addressed in the pre-launch phase as well.

**ANNOUNCING YOUR TRANSFORMATION TO COMMUNITY IMPACT  
Draft Communications Plan**

	<b>Pre Launch</b>	<b>Launch</b>	<b>Post Launch</b>
<b>Purpose</b>	Laying the groundwork	Formal public announcement via a media campaign and event.	Reinforce the reasons for change and report on your progress
<b>Target Audience</b>	<b>Internal audiences</b> –CEO –Board chair –Lead volunteers –Lead staff in community investment, resource development and marketing /communications –All other staff <b>External audiences</b> –Key community partners –Agency executives and their boards –Major individual donors and corporations –Other funders, including foundations and government –Media	–Media  –General public	–Media  –General public
<b>Objectives</b>	Key stakeholders are ready to champion the transformation when United Way is making the case for change	–Media accurately portrays United Way’s new work and goals. –The general public gains understanding of United Way’s shift in focus, including new relationships with traditional and non-traditional partners	–Media accurately portrays United Way’s new work and progress toward Community impact goals. –The general public understands and supports United Way’s shift in focus, including new relationships with traditional and non-traditional partners.
<b>Key messages</b>	–United Way is changing how it does its work –Those changes are going to mean improved lives and improved community conditions. –Leadership is fully informed, on board and ready to champion the transformation	–United Way has a strong tradition of evolving to meet community needs. –As social issues grow more severe and complex, our community needs different solutions. –United Way will continue to improve lives by supporting direct service programs, but will also build capacity to tackle the underlying causes of the most serious problems. –United Way is uniquely positioned to be the catalyst that unites the resources of our community—people, talent, knowledge, finances—to address our community’s critical needs.	–United Way is a resource in addressing the underlying causes of problems and contributes to long-lasting community change. –United Way is a trusted top-of-mind community leader, knowledgeable about community needs and assets, and worthy of support and engagement.
<b>Tactics</b>	–One-on-one or small group conversations, with United Way staff and board members conveying carefully crafted messages to key partners –Personal visits/meeting with editorial board.	–Broadcasts –Op/ed columns explaining the need for change –Press release –Press conference –Event	–Public service announcements –Placed media stories –Scheduled interviews highlighting initiatives such as 2-1-1, Success By 6®, Earned Income Tax Credit and disaster response work to demonstrate community impact –Electronic communications –Print newsletters, brochures –Annual reports that support impact messaging –Events both inside and outside campaign season
<p><b>Pre-launch communications activities</b></p> <ul style="list-style-type: none"> <li>• Establish the budget and timelines of the communications plan</li> <li>• Engage communications volunteers and/or PR vendors in developing a strategy</li> <li>• Create and post or distribute a white paper explaining the reasons for change</li> <li>• Develop two-way communications to encourage audiences to ask questions, give feedback, provide input and get involved (via electronics, town hall meetings, etc.)</li> <li>• Plan actual launch</li> <li>• Plan follow-up activities</li> </ul>			

**Attachment A**  
**COMMUNICATING ABOUT OUR AREAS OF FOCUS: DRAFT COMMUNICATIONS PLAN\***

<b>Target Audience</b>	<b>Message Objective/s</b>	<b>Possible Tactics</b>	<b>Timing</b>	<b>Who</b>
Board Members	<ul style="list-style-type: none"> <li>Update on our progress</li> <li>SPECIFIC actions each of them can take to help</li> </ul>	<ul style="list-style-type: none"> <li>Board Meetings</li> <li>One-on-one Board “buddy” program</li> </ul>	February	We each commit to keeping 1-2 board members up to date
Agency Partners	<ul style="list-style-type: none"> <li>Update on our progress</li> <li>Specific ask for their help in refining our areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>“Town meeting”</li> <li>Open dialog</li> <li>Partner board meeting</li> </ul>	January	CEO / Staff / Distribution team
Individual Investors	<ul style="list-style-type: none"> <li>United Way continues to support the community and has a plan to create sustainable solutions to X &amp; Y</li> </ul>	<ul style="list-style-type: none"> <li>Direct Mail</li> <li>One-on-one w/leadership</li> </ul>	ASAP	Campaign team with Staff support
Corporate Investors	<ul style="list-style-type: none"> <li>Update on our progress toward becoming more focused, including plan &amp; process for next 12 months</li> </ul>	<ul style="list-style-type: none"> <li>One-on-one from Campaign Cabinet</li> </ul>	ASAP	Campaign Cabinet
Potential Individual Investors	<ul style="list-style-type: none"> <li>United Way continues to support the community and has a plan to create sustainable solutions to X &amp; Y</li> </ul>	<ul style="list-style-type: none"> <li>PR</li> <li>One-on-one w/leadership</li> </ul>	September 2004 Kickoff	Staff
Potential Corporate Investors	<ul style="list-style-type: none"> <li>Update on how United Way is changing to be more community impact oriented</li> <li>Describe our current areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>One-on-one from Campaign Cabinet</li> </ul>	<ul style="list-style-type: none"> <li>Summer 2004</li> <li>Return early in campaign, ask them to sponsor a campaign</li> </ul>	Campaign Cabinet
Community Beneficiaries <i>(People who will benefit from solutions to focus areas)</i>	<ul style="list-style-type: none"> <li>Update on how United Way is changing</li> <li>Describe our current areas of focus</li> <li>Specific ask for input, involvement</li> </ul>	<ul style="list-style-type: none"> <li>Agencies</li> <li>PR</li> </ul>	January	Staff and volunteers with existing relationships
Community Institutions <i>(organized labor, libraries, Rotary, etc.)</i>	<ul style="list-style-type: none"> <li>Update on our progress</li> <li>Specific ask for their help in refining our areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>Develop target priority list, conduct one-on-one meetings</li> </ul>	January	Board members, other volunteers with existing relationships
Community Leaders	<ul style="list-style-type: none"> <li>Update on our progress</li> <li>Specific ask for their help in refining our areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>Develop target priority list, conduct one-on-one meetings</li> </ul>	January	Board members, other volunteers with existing relationships
Media	<ul style="list-style-type: none"> <li>Briefing on how United Way is changing</li> <li>Current areas of focus</li> <li>Updates on our efforts</li> </ul>	<ul style="list-style-type: none"> <li>One-on-one w/ reporters</li> <li>Present to editorial board</li> </ul>	ASAP, then periodic	Marketing staff and volunteers
Local & State Government	<ul style="list-style-type: none"> <li>Update on our progress</li> <li>Specific ask for their help in refining our areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>Direct mail to target agencies based on areas of focus</li> </ul>	June	Staff
Other United Ways	<ul style="list-style-type: none"> <li>Update on our progress and process for selecting areas of focus</li> </ul>	<ul style="list-style-type: none"> <li>Listserv</li> <li>ITP Learning Circle</li> <li>Conferences</li> </ul>	January	CEO

\* Adapted from draft communications plan from United Way of Norwalk & Wilton, Norwalk, CT

## FINAL THOUGHTS

In establishing the communications plan, don't forget to identify who (specifically) is "on point" for accomplishing what by when. The planning stage is also the appropriate time to identify how you will track progress and results of your plan.

While the focus of this discussion has been on communicating the shift to community impact, the stages and principles apply each time your United Way has a new effort or accomplishment to report. A sample of a draft communication plan used when one United Way was communicating its new areas of focus can be found in this document.

Thanks to Orange County United Way, United Way in Waukesha County (WI), United Way of Eastern Maine, United Way of North Central Florida, United Way of Norwalk and Wilton (CT), and United Way of San Diego County for their contributions to this work.

For more information, visit the United Way Knowledge Café (<http://online.unitedway.org/cafe>) and check out additional resources within Standard 3.6, Relationship Building and Brand Management / Prominent Stature and Reputation.

Questions or feedback? Contact Katie Pritchard, United Way of America Director of Community Impact Learning and Design, at [katie.pritchard@uwa.unitedway.org](mailto:katie.pritchard@uwa.unitedway.org), or Tish McCutchen, United Way of America Director of Field Communications, at [tish.mccutchen@uwa.unitedway.org](mailto:tish.mccutchen@uwa.unitedway.org).

**United Way  
of America**

701 North Fairfax Street  
Alexandria, Virginia 22314-2045  
[www.unitedway.org](http://www.unitedway.org)



what matters.®