

# Using Guide 2 Building Capacity

## Introduction

This guide was developed by the Arkansas Department of Health to provide background material, tools and resources to individuals involved in Hometown Health Improvement. It is intended to be used as a general guide. [Each community should choose the tools and tailor the guides to fit their unique needs.] The guide contains explanatory text, specially designed tools and worksheets, and suggestions for other available resources.

If you have any questions concerning this guide, please contact your Hometown Health Regional Leader.

*Use this margin to note interesting tools or ideas.*

## How to use this guide

This guide contains seven sections. The right side features explanatory information on each topic. The left side of the page features comments or questions to spark thought or conversation about the text, along with providing open white space for written notes.

**Section One** features the table of contents and the discussion of using the guide.

**Section Two** offers communication skills and tools to help your coalition communicate effectively. Information concerning media is also included in Section One.

**Section Three** features meeting management skills. This section is provided to help you plan and host successful meetings for your coalition.

**Section Four** helps you deliver presentations. In this section, you will find ways to improve your current



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presentations as well as guidelines on making effective presentations.

**Section Five** contains tips on facilitating coalitions; setting ground rules, brainstorming, etc.

**Section Six** is the tools section. The toolbox symbol, located on the left, tells you that this particular tool is provided, not only in the section to practice with, but also in Section Six for you to copy and use in the future.

**Section Seven** provides additional sources for you to review concerning the topics covered in this guide. Literature, web pages and contact information of recognized experts are featured, along with the sources that contributed to this guide.

### **Evaluation of this Guide**

In the back pocket of this guide you will find an evaluation form. When you complete your first review of this guide, please take a few minutes to complete and return it to the address listed on the bottom of the form. It is our goal that this guide be a useful tool to you as you begin your work with Hometown Health. Your comments will help us evaluate our work and create quality materials in the future.

### **Acknowledgements**

Although every attempt has been made to acknowledge all of the individuals who assisted in developing this guide, we realize some contributions may have been missed. Therefore, we want to acknowledge the following individuals, along with any others not mentioned, who reviewed this guide and provided many helpful comments. Without their support, production of this guide would not be possible.

**Gail Gannaway \* Jackie Gorton \* Jean Hagerman \* Mary Cannell**

## Communication Plan

Communicate, communicate, communicate! Effective communication is one of the most important things you can do to assist your group to succeed. Make sure that the lines of communication are open with the media, individuals in the community and members of your coalition. This will help to build a satisfied, dependable group, who gets the job done and makes your organization successful.

*“You must be committed to developing a community communication plan so that when the health status assessment is completed, people and organizations will be well informed, have been involved in the process, and ready to act.”*

On the next page you will find Productive Communication Skills to help team members communicate effectively. This tool is also found in the Tools Section, Tool 1.



You must remember; however, that communicating your initiative's goals will not necessarily solve all of your problems. Getting the word out will help you attract people, but you have to give them a reason to stay involved.

### **Developing a Communication Plan**

The goal of your communication plan is to get the correct message to the targeted populace and beyond in order to make the most of your initiative's long-term benefits to the community. You not only want to be recognized, but you also want the programs or initiatives you develop to be effective.

*"Successful communication is an ongoing process, not a one-time event."*

In developing your communication plan; you need to make sure you know the answers to these questions:

- What are your goals?
- Who is your target audience?
- What are your accomplishments?
- What publicity have you received to date?
- How can your organization best get the message out?
- How much money do you have to work with?
- What other resources do you have? (For example, the owner of the paper or local radio station is a member of your coalition)
- What are some obstacles you may encounter?
- How can you get around them?

Your plan will help you know how you are going to get from point A (an under-utilized initiative) to point B (a well-known initiative overflowing with involvement and activity). A plan will make your communication efforts more efficient, effective, and long lasting. It is important because it focuses on the set of steps needed to achieve your ultimate goal. A planned effort will almost always be superior to an unplanned, unorganized attempt. Finally, developing a plan to get the word out about your organization will almost certainly be easier than trying to start a new program.

So, when should you develop a plan for communication? As soon as you begin planning your objectives and activities, you should also begin planning ways to communicate them to the community. Successful communication is an ongoing process, not a one-time event.

If you are planning on beginning an event, it is important that you start publicizing your initiative and event as soon as possible. You want people to show up, don't you? On the other hand, if your group has been around for a while, you may want to renew public interest. You should start on a plan to do so. You have to identify goals for your new communication plan.

The following seven steps will help you create a communication plan for your community's Hometown Health Improvement Project.

### **Step One: Define Your Goals**

What are your goals? Not all initiatives or organizations are the same. For example, if your group has been established for sometime but is taking on Hometown Health status, your goals will be a little different than if you are soliciting members for a new group. Your goals may also vary depending on whether you are gathering input or trying to gain support for a strategy you want to implement. To define your goals, ask yourself the following questions:

- What do you hope to accomplish?
- Why do you want people to know about your organization?
- Are you looking for people to get involved?
- Are you looking for funding sources?
- Do you want to tell the world that your program is working?

**Step Two: Define Your Audience**

Who is your target audience? Whom do you wish to inform about your existence, goals, services and needs? Getting the word out is important. But getting the word out to people you want to involve is even more important. You must decide who those people are and plan accordingly. Your communication plan should be targeting those who will benefit most from your organization's work.

Most Hometown Health Improvement participants will want the entire community to know who they are, what they are about, and what accomplishments they have made. This step is very important when you are implementing the strategies your project has identified, especially if they are targeted at a particular segment of your community. Your target audience may be very specific or very broad. Regardless of the size, the communication plan must cater to the target audience that you have identified.

**Step Three: Define Your Accomplishments**

What are your accomplishments? When you start planning to make the community aware of what your group is about, it is a good time to step back and survey what you have accomplished so far.

You might want to keep a "scrap book." One good idea would be for someone to begin and maintain a folder that contains press clippings, photos, and brochures outlining or detailing accomplishments. That way, materials are all in one place when you need them.

Looking at what your initiative has done will enable you to get a clear mental image of your accomplishments. By reviewing your successes, and possibly re-examining some of the mistakes you may have made along the way, you

should get a good idea about where you are, where you are going, and what you want to communicate to your audience.

Take those accomplishments and use them as your plan. Look at what you've done and try to see how better communication could improve aspects of your initiative.

#### **Step Four: Define Your Publicity**

What publicity have you received to date? Who knows about your coalition? What do they know about it? Let's hope your group is not the best-kept secret in the world. Your organization has probably worked very hard, and the more people who know about its existence the better.

Remember you want people to know about your coalition. You want your name in people's minds. If you want new members or participants, keeping quiet is not the way to accomplish this. If people do not hear about your organization, there is no way they are going to get involved. You want them involved, so tell them about it.

How should you let people know about your project? This depends partly on you, and partly on your audience. You may want to put flyers on every car in the city, advertise in the newspaper or radio, or arrange a press conference to proclaim the existence of your program or initiative. Your choice should depend upon what publicity has worked in the past and also on the resources you have available. But it is important to aim your message at those you are trying to get involved. For example: Using radio or television advertising during school hours is probably not the best way to involve your city's youth.

*“Remember you must use the method that best fits your target population.”*

### **Step Five: Define Your Means of Communication**

How can your organization best get the message out? An initiative or organization has so many options to get the message out to raise awareness. An organization may consider using press releases, preparing guest columns and editorials, arranging a press conference, coordinating with national awareness weeks/months, and conducting community forums.

You may also want to advertise. You can do this by creating public service announcements on screen or in print, making posters and flyers, creating newsletters, and special promotional items like bumper stickers, T-shirts, and postcards.

Remember you must use the method that best fits your target population. For example, if your program is trying to reach stay-at-home moms or dads, it may be useful to try television advertising during daytime shows. If you were trying to reach working moms or dads, it would be better to use radio advertising during the morning and evening commutes. In order to successfully choose the best method for your project, you have to match your message to your medium. This involves the following actions.

- **Understand the medium**

Each type of media is different. Radio newscasts (with the notable exception of National Public Radio) offer only the briefest accounts of events. Complex issues simply do not fit. Expect radio to use only one sentence you speak – eight to ten words. Television also tends to focus on events and activities. Most of their stories include one or two sound bites, excerpted

from brief interviews conducted at the scene of the news. A typical television sound bite is about 10 seconds long – or one or two sentences. By contrast, newspapers, which can dedicate several columns to a story are interested in detailed information. They not only cover events, but also report about ideas, concepts, theories and abstracts. They are able to make complex issues understandable in a way that broadcast media simply cannot.

- **Select the right medium**

If you're trying to reach decision-makers with a complex message, the newspaper may be the best place to begin. To get a message out quickly (e.g., a food recall, public health alert), start with radio, then go to television and, finally, to the newspaper. To announce a new program or service to a large audience, arrange visuals and interviews with the people involved and invite the television cameras.

- **Adjust for the medium**

No matter how worthy the subject seems or how extreme your expertise, the broadcast format always prevails. Radio and television reporters cannot and will not use long, complex answers. Thus, you must adjust your message to their medium. Plan a brief statement, begin with your most important point, and say it the best way you can. In other words, create a sound bite and when you have said it, stop talking. For an interview with a newspaper or magazine reporter, gather as much pertinent information as you can, then provide it in spoken or printed form. Print reporters want more information, including details, statistics and justifications.

*Speak to express a thought, not to impress the audience.*

- **Be quotable**  
Reporters love a good quote because it adds dimension to their story. How can you be more quotable? Study the quotes in today's newspaper. Often, you'll find they contain colorful words, or express feelings or emotion. While quotes may not be the most important things the person said, they are interesting and give insight to the person's opinion or state of mind. Offer analogies or cliches. They can help explain complicated issues in an easily understood way. Above all, keep it simple. Always avoid jargon, acronyms and technical terms, and limit your use of complex numbers and statistics. Speak to express a thought, not to impress the audience.
- **Be prepared**  
Anticipate questions by asking before the interview what information the reporter will be seeking. Buy some thinking time and use it to develop and shape answers for that particular medium.

If possible, create your quotes before the reporter or TV crew arrives. Remember to use colorful words of emotion. The public wants to know how you "feel" about an issue.

Also, think about how you look and sound. In radio and television, how you look and sound is as much a part of the message as the words you speak. If the audience hears uncertainty in your voice or sees your eyes darting back and forth, the message in your words may be lost. It is the passionate and seemingly honest person who gets people's attention and convinces the audience to take action.

Under the pressure of an interview it is easy to forget that reporters are people too. It is not in their best

interest – and certainly not in yours—for you to become nervous or agitated because of the pressure. You will go a long way toward avoiding tension by being prepared and understanding the process. View each interview as an opportunity to advance your message. By limiting the information you give, you take some editorial control and reduce the chance of being misquoted.

On the next page you will find a Sample Media Advisory. Review this sample and others provided in the Tools Section, tools 2-3.



**Step Six: Define Your Resources**

What kind of resources do you have to work with? If your initiative or organization is large, popular, or well established, you may be working with a nice budget. In most communities this will not be the case. You do have resources or access to resources through your coalition members. For example, does someone know the owner of the local paper or radio station? Whatever you have, you must plan to use it as effectively and intelligently as possible. Do not be discouraged by having a low budget initially. Remember that word of mouth is free. It is possible to raise awareness of your initiative or organization with little or no money, and it is also possible to not raise awareness of your program with a substantial amount of money. In any case, it is important to use the resources you do have to maximum effect. If you do need more, you can develop a plan to seek them out.

Review the following page *“Fifty and One” Different Ways to Communicate Other Than Radio and Television.* See if you can list additional ideas.

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The “Fifty and One” Different Ways to Communicate Other Than Radio and Television will help you get started. This tool can also be found in the Tools Section, tool 4.



**Step Seven: Define Your Obstacles**

Plan ahead for obstacles you may encounter. How will you get around them? As you already know, things do not always go as planned. Don’t worry about the obstacles just prepare for them. Making a plan will help you to be prepared.

## Utilizing the Press

### Proactive Press

Proactive outreach is based on one basic principle. You create the news; you do not wait until the news comes to you. Although you may be linking your outreach to an event or hot news item -- like the national Great American Smoke out-- the local "spin" can be yours to create.

Proactive press can be an important and valuable part of your communication plan, but with it goes some responsibility on your part. Without this responsibility you will destroy the relationships you build and hurt your credibility. If you have contacted them and offered information, they will expect you to be responsive when they call you. News has a time value, and when a reporter calls you seeking information for a story, you should return the call as quickly as possible. They will expect you to meet the deadlines you agreed upon. If they do not give you one, ask them for a deadline. If you miss a couple of these, they will stop calling you. So rather than a call from the press as an interruption, see it as an opportunity!

### Press Events

Press events should be held when you have something "real" to say, like the start of a new program. Both the location and timing are critical. It is best to have press events early in the day, but after 10:00 a.m.

You want to give reporters and editors time to edit their tape before the news airs at noon and in the evening. In some circumstances, you may want to consider timing a press conference so television can show it live at noon.

Not every community has television media outlets. In communities such as these, the local newspaper or radio station can be just as effective. Some local radio stations are willing to do live remotes. Some communities have local television stations that cover particular community events such as school functions. If you have such a station, think of ways to link your story to the issues they primarily cover so they will run your event.

The standard location for press events is usually a conference room, but be more creative when you can. If the event is on, for example, the "5 A Day" program, hold the event at the produce section of a local farmer's market. If it concerns kids in daycare, hold it at a daycare center. Reporters like to walk around and see "real people."

### **Passive Press**

Reporters do not always "bite" when you want them to. Sometimes it takes a while for them to catch on. You can quietly "troll" for press coverage with minimal effort, by including the ways to link your story to the issues they primarily cover so they will run your event.

Opportunities for passive press outreach include:

- Informational Mailings: Whenever you see an appropriate article, clip it and send copies to reporters with whom you have established relationships. Attach a note saying something like "thought you might be interested in this" and include your business card.
- Newsletters: Reporters may be included on your newsletter mailing list. Also remember, anything you send out for wide distribution (or anything at all, for that matter) may be obtained by the press through

the Freedom of Information (FOI). Do not put anything on paper that you would regret seeing in the newspaper.

- Guest Columns and Opinion Pieces: Writing and submitting your side of the story to newspapers can be a successful means of conveying your messages. Smaller papers will often print your submission because they need “hard news” that affects local folks. Call newspaper editorial departments and ask about the format in which they prefer guest submissions.

## **Press Event Timeline**

Pulling together a press event requires relentless and often repetitive attention to every possible detail. Things happen; therefore, the best you can do is plan, anticipate, and keep your sense of humor. The timeline below assumes you have two weeks to prepare; but you may have two days. Sometimes, you may have two hours.

### **Today**

- Start to think about all the possible press events you could have over the next year. What are some good stories? Who would you feature? Where would you hold the event?
- Think of who your “A-Team” for a press event would be. If you had to quickly pull together an event, who would you recruit to help you write materials, contact participants, work out site logistics, call the media, create visual aids and speak at the event?

### **When the Event is Two Weeks Away**

- Assemble a team and assign roles, including writing and material development, site logistics, attendance, media contact, and other things, which need to be done.
- Decide what the story is and why the press would be interested?
- Decide on the main message or messages.
- Develop a program including the length of event, who speaks and for how long, entertainment, etc.
- Inform and get approval from superiors, if necessary.
- Designate a “master of ceremonies” who will start the event and introduce other attendees.
- Schedule all speakers and make sure everyone will be able to attend.

- Create any charts, slides and other visual aids you may need.
- Decide on and secure the site. Does it provide a good visual for television? Is it a good site for news photos?
- Consider any events that may conflict with yours.
- If necessary, brief participants and superiors on the nature and purpose of the event.

### **Ten Days Out**

- Visit the site. Any problems with access, light, outside noise? Consider alternative sites.
- Draft media advisory. Don't forget to check with the Communications Office if you need assistance.
- If musicians or other entertainment is coming, find out what they require in staging or sound.
- Secure any sound, lights and staging you may need. Find outside vendors, if necessary.

### **One-Week Away**

- Send media advisory to news outlets.
- Determine what staff should be at the event to answer technical questions on background.
- Call key reporters and assignment editors to "pitch" the story and gauge interest.
- Draft press release for the event and get content approved. Call participants to solicit quotes or confirm quotes you are attributing to them.
- Draft talking points for speakers.
- Call all the participants: Is everything okay? Are you still coming? Do you need anything?
- Do a final check on site.

### **Two Days to Go**

- Fax out another copy of the media advisory with "Reminder" printed across the top.

- Write a script of the event and send it to the participants.
- Assemble press-briefing packets.
- Call reporters and assignment editors to sell them on attending. Re-send advisory when necessary.

### **The Day Before the Event**

- Call reporters and assignment editors again, when necessary.
- Call all logistical contacts (light & sound, staging, food, music and entertainment) to confirm they will be there early enough to set up.

### **The Morning of the Event**

- Have someone on site **two hours** before to make sure everything is in place and in working order. Test your microphones, sound system and other equipment.
- When your participants arrive, have a brief “huddle” to go over the script and roles.

### **During the Event**

- Greet reporters as they come in. Introduce yourself. Hand them press packets. Point out and introduce the reporters to participants. Stay positive and on the message. Remember, the story is not sold until it runs on the air or in the newspaper.
- Have someone stationed outside to usher any late-arriving reporters into the event.

### **Now That It's Over**

- The next morning, contact the reporters who attended and ask if they need any additional information or interviews.
- Send reporters any information that you promised or that might be helpful.
- Send thank you notes to everyone involved.

- Ask colleagues to video tape the news programs of any television stations that attended.

## **Handling Problems and Crises in Communication**

Even with the best communication plan there will still be times when problems arise. Suppose you issue a press release about a meeting you are holding and you give the newspaper the incorrect date. Or suppose the information is right and no one shows up, or some one in your group gets arrested for passing bad checks or drunken driving. If you are faced with similar situations, it will help if you have a plan for addressing them.

This section offers tips that will assist you in avoiding these situations as well as giving you some ideas on how to deal with them if they do arise.

First of all, to communicate effectively, you need to keep these things in mind.

### **1. Communication is not one-sided.**

You can blanket the community with information, but if that information is not understood, or is not understood in the way you meant it, you might as well not bother. Any good communicator has to know about the audience and try to understand their point of view.

### **2. Communication involves more than words.**

It can include body language and tone of voice, as well as the attitude and general tone that are projected in speech, writing or actions. Therefore, an organization has to make sure that anyone or anything that represents its projects has a respectful and welcoming style that is inclusive of all cultures represented in the community.

### **3. Different groups often communicate using different styles and assumptions.**

Peoples gender, racial and cultural background, educational experience, and perceptions of who has power, all influence how they receive and interpret communication. It is absolutely necessary to know your audience, and think carefully about how they will understand what your organization presents.

How do you know if you have a communication problem? There are many different kinds of problems can arise when you're trying to let the community or a particular group know who you are, what you are doing, and why they should care. Some problems have to do with the presentation of your message, and others are dependent on the perception of others. Different issues call for different types of resolutions. In this part of the section, we look at some of the problems you might face in trying to let the community know about your coalition. Later on, we offer some ways to deal with them.

#### **General Communication Problems**

First, try to find out exactly what the problem is. Why is a particular group angry with you? What do they think the issues are? What, specifically, do people not understand about your message? Do not be afraid to ask. People are usually more than willing to state their position, or to explain what they are confused about. Avoid rhetoric, but be honest in all situations. Do not try to change the intent of your message to please someone. Unless you really think they are right, and you are really going to change what you were planning to do. Sometimes, a change is justified, and will not have a great effect on your mission. Other times it would negate what you are trying to do. If you think a change might be in order, make sure you have carefully thought out and

discussed what it would mean for your goals and purposes before you make a decision.

Try to talk with members of any group that is angry with you or seems to oppose you. Really listen to what they have to say and take it seriously. Some of their criticisms may have merit, or you may be able to address their concerns in a way that satisfies them and earns their trust. In any case, they will be far less angry if they know they have been heard. Even if you continue to disagree, your relationship can be civil if respect is maintained.

Be as flexible as possible without betraying what you believe in and are working for. Be willing to rethink ways of doing or saying things, or to look for solutions that include more groups of people. That leaves the door open for conversation, and for finding, as is often possible, common ground.

If you are trying to correct a problem or misconception, always take responsibility and apologize for anything that was your fault. Even if it makes you feel uncomfortable, it is always better to admit that you were wrong and that you're sorry for it. If it was not your fault, you should explain what happened so people will understand the error, unless the explanation is likely to alienate someone you need to work with.

Regardless of what the problem is, keep restating the message you want people to hear in the ways in which they are most likely to hear it. You want your message to be the one that people remember in the long run.

**Some common communication problems:**

- **Your message is not reaching your target population**  
For some reason, the people you are trying to reach are not hearing about you and what you have to tell them.
- **People do not understand or misunderstand your message.**  
Either people have no idea what you are trying to say, or worse they think you are saying something other than what you think you are saying. This could include members of the target population not understanding that your message is meant for them, or it could lead to the next problem if they misunderstand in a particular way.
- **People take issue or disagree with your message, or find it offensive in some way.**  
The differences might be political or philosophical, or you might have used some language that people believe is offensive or threatening. In any case, you now have antagonists out there who are upset with you. A message using a term that a particular group – or, even worse, your target group – interprets as racist or demeaning, for instance, can make your relationship with that group extremely difficult. This issue is complicated by the fact that sometimes it is difficult to tell which terms are acceptable and which are not.

Another possible error is the misperception of blaming or demonizing a particular group when analyzing a problem. For example, if the local business community sees itself as being portrayed as the villain in a discussion of unemployment, whether or not that was the intent of the message, they are unlikely to support your organization.

- **People dislike or distrust your organization.**  
Because of this distrust, people take issue with what they think your message is, even if they have not actually heard the message itself. Again, your differences may be political, philosophical, or otherwise, but whatever the reason, these people know that you are the enemy.
- **Your message has been garbled or misrepresented in the media.**  
Every organization has this experience at least once. It could be the result of your error, a reporter's error or inexperience, or even outright ill will on the part of the reporter or his/her employer. You have to deal with the fallout concerning why it happened.
- **You make an unfortunate error.**  
Unfortunately, typos or transposing numbers can result in the opposite of what you are trying to accomplish. In other cases, they can actually hurt the credibility of the organization. Always proof the information. It is a good idea to have someone else proofread it too. We do not always catch our own mistakes.

## Dealing with communication problems

Now that you have some idea of what kinds of problems you could face, you need to look at some ways to address them. As we mentioned earlier, different problems require different solutions. There are also some overall guidelines that should help in dealing with any communication difficulties or any communication, for that matter.

## Dealing With Specific Communication Problems

- **Your message is not reaching your target population.**

If you examine your language, your assumptions about the people you are trying to reach, and your assumptions about how and where they can be reached, you are probably well on your way to solving the problem. Checking with members of the group you are aiming at about what is likely to work, and then using it, seems obvious, but if it has not been done beforehand, it is worth mentioning.
- ✓ Are you using the language that most people in your target population actually speak, or prefer to speak (e.g., Spanish in Hispanic neighborhoods)? If so, is your language too “educated” for them to understand or respond to? Are you assuming knowledge, of written English, for instance, that most people in your target population simply do not have?
- ✓ Are you using ways of getting the word out that people are likely to pay attention to?
- ✓ What are the channels of communication that the people you are trying to reach use? What do they hear, or read, or watch? Whom do they listen to? Where are they likely to be found?

- **People do not understand – or misunderstand – your message.**

You have somehow missed the mark. What are you doing wrong, and how can you fix it?

- ✓ Once again, you need to examine your language and assumptions. Are you using the wrong language, or assuming that your audience has some knowledge that it really does not?
- ✓ Find out what people think you are saying. It may be that a single word or phrase is changing or confusing your message for most people; if you can spot it and change it, your problem may be solved.
- ✓ Examine the message itself. Do you understand clearly what it is you want to say? If not, you need to re-word it so you are able to state it in terms that others are able to understand.
- ✓ Restate the message more clearly, and test out the new version with people who represent your audience, to make sure they understand what you intend.
- ✓ If appropriate, apologize for any misunderstanding, and restate your real message strongly.

- **People take issue or disagree with your message, or find it offensive in some way.**

Disagreement can take a number of forms, and it is important to know exactly what you're dealing with.

- ✓ Are opponent's issues based on political or philosophical differences about your basic premise? Or are they based on the wording or presentation of your message? Do opponents feel

your message demeans or attacks a particular group, or misstates an issue? Can you change the message to respond to these concerns? Try to establish communication with those who disagree with you. Can you respond to their concerns without compromising your goals or principles? What, if any, are your points of agreement? Can you work together in some ways? Are you willing to discuss their issues over time?

- ✓ Are you at least partially in the wrong? Are opponents right in any of their objections? Is a public or private apology or retraction in order?
- ✓ What are the consequences of continued disagreement? Can you agree to disagree in a civil way, and would that be acceptable for your organization?
- ✓ If your differences are not resolvable, make sure that your point of view is always stated clearly and correctly. It is helpful to have it stated by people with status or credibility in the community who support your group. Continue to treat opponents with respect, but always do your homework, so that side issues cannot be used as an excuse for negating your message. Make sure that anything stated, as fact by either side is accurate.
- ✓ If all else fails, be prepared to play hardball by marshaling political backing, staging demonstrations, etc. If your opponents will not move, you need to be strong.
- ✓ Finally, redouble your efforts to send your message to those you want to reach. Persistence is the key.

- **People dislike or distrust your organization, and therefore take issue with what they think your message is, even if they have not actually heard the message itself.**

How you deal with this kind of problem depends upon why the problem exists. If the people merely misunderstand what your group does or stands for, then it is purely a communication issue, and can be handled as such. If a group feels attacked by what you're saying or trying to do, that's a different kind of issue. If you are seen as representing a religious, political, or social value system, which a particular group of people finds threatening or hateful, that presents a whole new set of difficulties. A group may have and give out an inaccurate version of your message because they mistakenly think they know what you think or they may be misrepresenting you intentionally.

- ✓ Try to allay fears, but do not misrepresent your ideas. It may be that those who see you as representing something they distrust or fear - or hate - are right. If they are, the best you can do may be to try to keep talking and look for common ground.
- ✓ If your message or your organization is being misrepresented, whether intentionally or unintentionally, it is absolutely necessary that you respond immediately. You need to find the best medium in which to correct false information or impressions. It could be the press or other mass media, a public forum, word of mouth, the Internet...It depends on who you are trying to reach, and what the nature of the community is. However, it is important to avoid attacking or bad-mouthing the other side: treat everyone

*A newspaper editor, who was feuding with the local School Committee and Superintendent, printed misinformation about them and refused to publish letters or press releases correcting it. School Committee members realized that there was a local website where members of the community aired concerns, and that many of those most inflamed by the paper's misrepresentations logged onto it. Those members started using the website to correct errors. Within a short time, many of the rumors and controversies started by the paper had been stifled, and a civil dialogue had begun.*

respectfully, tell the truth, and answer questions. If there is a moral high ground, you want to be seen as occupying it. If your opposition chooses to do the same, there is that much more chance of some resolution.

- ✓ Do everything you can to make your message stronger and more widely available than that of your opposition.
- **Your message has been garbled or misrepresented in the media.**

As we said earlier, this happens a lot. There are really two strategies here: first, try to make sure it does not happen in the first place; and second, address it if it happens despite your efforts to prevent it.

- ✓ Successful prevention entails establishing a close relationship with the media, and particularly with finding a sympathetic person at each outlet – newspaper, radio or TV station – to deal with directly. You can head off errors by providing key points and descriptions – especially those that they have gotten wrong in the past – to reporters and others. Even though they will probably rewrite whatever you give them, they will be more likely to get it right.

Remembering to call your contacts when interesting stories are available will always be remembered in turn, and will get you both coverage and support when you need them.

It is also helpful to try to become an "expert" to whom the media turn when they are trying to understand or report on an issue your organization is concerned with. Be available no matter how much trouble it is when media people call.

- ✓ If, in spite of your efforts, you still get misrepresented, take steps to correct the error right away. In the case of a simple error, a letter to the editor or a press release may solve the problem.
- ✓ If the misrepresentation was intentional, you may have to find a different avenue of communication to get the correction out.
- **You make an unfortunate error.**
  - ✓ Correct the error as quickly as possible, through as many channels as possible. Use the media, flyers, word of mouth, and/or anything else you can think of to get news of the error and the corrected information out to as many people as possible.
  - ✓ Take full responsibility for the error as soon as you discover it, and apologize profusely, publicly, and often.
  - ✓ Be as self-deprecating and good-humored as seems appropriate. If people can see the situation as humorous, and see your organization as good-naturedly acknowledging its error, they are more likely to be on your side, rather than being furious. Be careful: some mistakes just are not funny, and if your organization seems to be making light of a serious situation, this tactic can backfire.

## Handling Crises in Communication

So far, we have been talking about problems in communication. Some of them are pretty serious – having a powerful group opposed to what you stand for is no joke – but they usually do not mean life or death for your organization. A crisis is, by definition, a make-or-break point, one that can send a situation, an individual, or an organization either way.

*A crisis is, by definition, a make-or-break point, one that can send a situation, an individual, or an organization either way.*

A crisis in communication involves a situation where the life, or at least the well-being, of your organization is really in the balance. A crisis could make the organization stronger, weaken it considerably, or even kill it. A crisis is more serious than just having powerful opposition, or getting the date of a clinic wrong. It means being put in a place where an outside force could shut the organization down, where funding and support could be withdrawn, or where public disapproval could become so strong that the organization would be totally ineffective. It also means that a positive resolution of such a crisis could make the organization look better than it ever has, or make it seem tremendously competent and ethical. There is no way to guarantee the better result, but there are some things you can do to make it more likely.

### Develop a crisis management plan

You are the director of an organization that is dependent on the good will of the community. For example, it is 8:00 on a Monday morning. You have come in early to get some work done, and you are surprised to hear the phone ring. It is the newspaper – not the local newspaper, but a large, regional daily one. The reporter on the other end starts asking you questions about a staff member who left the organization only months before. You realize the person in question has been involved in a horrendous crime. Would you know what to do or say?

This actually happened. Ultimately, the organization involved was able to deal with the publicity in a positive way. But it could have been disastrous. It would have been much easier if they had had a crisis management plan. M. Booth and Associates of the Foundation Center include a section on Crisis Management in their book, Promoting Issues and Ideas: A Guide to Public Relations for Nonprofit Organizations. According to them, "the best way to deal with a crisis is to plan for it before it happens." They say that all organizations should have a crisis committee, which, in turn, needs to have a crisis management plan. Ideally, everyone in the organization should have a written copy of such a plan. Thus, when a crisis arises, the organization is ready to address it, and it is the committee's job to automatically put the plan into effect. Booth and Associates suggest a plan, which includes the following elements:

- Determine the seriousness of the situation. What are the possible negative consequences to the organization? What can you do to minimize them? Can you keep the story from breaking? If not, can you make sure that it's accurate? How can you make sure that the real tasks of the organization get done while this is going on?
- Develop position statements, answers to potential questions, and fact sheets that aggressively set forth your organization's position. You may or may not need them, but it's important to have them if you do.
- It may sometimes be best if you break the story, rather than waiting for the papers.
- Notify everyone who has a major stake in the organization who are supportive and can speak for the organization. Try to make sure that these

stakeholders hear it from you, rather than reading about it in the paper.

- Appoint one person to deal with the media. This will eliminate any chance of different people giving different answers to questions, or of the message being unclear. The spokesperson should be able to:
  - ✓ Answer a question or offer to find out the answer.
  - ✓ Offer to give the reporter the names of people who might provide third-party endorsements of your organization.
  - ✓ Simply answer yes or no, or "I am not going to answer that question," if you do not want to answer a question in detail or at all. If you have any hesitancy about answering a question, do not let yourself be pushed into it. Do not elaborate and do not explain.
  - ✓ Ask when the story will appear.
- Oversee the crisis management process. Update the committee regularly, and make sure that the crisis management procedure is followed.
- After the crisis has been resolved, bring all interested parties up to date. If the crisis involved an organizational problem that was corrected, make sure news of the solution is circulated.
- Do not forget that you have to deal with this issue within the organization as well as outside of it. The sense of betrayal that staff or board members may feel if someone harms the organization, or the sense of shock if someone they work with turns out

to be engaged in illegal or harmful activity, has to be acknowledged and resolved. Ultimately, there has to be some closure – a sense of the appropriate action having been taken, some healing having occurred, and the affair being over. Otherwise, the bad feelings left from this kind of situation can poison an organization indefinitely.

- Remember to thank everyone who helped you handle the situation.

### **Dealing with a typical crisis**

A crisis management plan like the one above can help enormously to control the potential damage, but it is not all that is needed. If we look at a specific situation, some other necessary elements come to light.

Someone connected to your organization publicly says or does something that is profoundly offensive to the community. This could include illegal activity, a remark that seemed innocent at the time, a bad decision, or rampant stupidity. The offender might be a participant, a staff member, a Board member...it does not really matter.

The organization will take the heat for it, almost no matter what the situation. There are a number of bases that need to be covered in order to address this type of situation.

- If the situation involves a written or spoken communication or action which is inherently offensive, or which attacks an individual or group, you should immediately and forcefully, through every channel available to you, emphasize that this is not the policy or opinion of the organization.

- State equally forcefully what the policy or opinion of the organization in this matter is, and continue to repeat it at every opportunity.
- Take responsibility and take it seriously. If it is appropriate to take action toward the offender make sure that action is contemplated, and keep the community informed of what is happening, at least at the "We are looking at this seriously and reviewing our options" level. If a staff or Board member is disciplined or fired or asked to resign, the public should know, although they do not necessarily need all of the details.
- Apologize to whoever was offended or affected – to the whole community, if that is appropriate and mean it.

### **To sum up...**

The best way to deal with problems and crises in communication is to try to prevent them in the first place. Since this is not always possible, when you are faced with a problem or crisis, it is important to remember...

- ✓ Identify the problem as clearly as possible.
- ✓ Try to talk with your target audience or with opponents face to face. Ask about and really listen to their objections to your message. Keep communication open, and stress the similarities, rather than the differences, between you.
- ✓ Be honest, and avoid rhetoric. Be flexible without betraying your mission.
- ✓ Always treat everyone with respect. Try to understand their positions and reasons, and to allay their fears.

- ✓ Always take responsibility and apologize when the error or responsibility is yours.
- ✓ Keep restating your message clearly, and in terms people can understand. Always answer charges or misrepresentations, and do so forcefully, calmly, and with facts.

Remember finally that problems and crises, if they are handled properly, are not the end of the world. You have to expect that these things will happen occasionally, and that you need to have plans to address them. If, when people think of your organization, they remember a crisis in which you acted well, rather than whining and blame casting, your chances of success are greatly increased. It has been said many times that the Chinese character for "crisis" combines the characters for "danger" and "opportunity." Good preparation and a cool head can make the scale tip much further to the "opportunity" side.

## Developing a Media Plan

One group you will need to communicate with is the media. Effective media relations start with a plan, on paper, so that you can consider every facet of the task before you. To begin, ask yourself a series of questions like those outlined below. Even when you think your event or story is small, you still need a plan.

### 1. What is your story?

- Do you have a good story?
- Why is it a good story?
- If you have a good story, do not be afraid to tell it.

### 2. What are your goals?

- Media attention
- Public education/awareness
- Change in behavior

### 3. Who is your audience?

- The public at large, parents, etc.
- Third party supporters
- Civic organizations (chambers of commerce, service clubs, volunteer groups, etc.)
- Business
- Media
- Health care providers and associations
- Policy makers or key decision makers

### 4. Research: Have you done your homework?

- Avoid surprises; anticipate questions; know both sides.
- What is the history of the issue? Does the history of the issue reinforce your message?
- Who is affected, in the short-term and long-term?

**5. What are your messages?**

- It is essential that everyone on your team speak with one voice; everyone should agree on the message
- Keep it simple and concise – capable of being said in 10-second bites
- The message should be understandable to your average 7<sup>th</sup> grader, no technical language
- Always consider how your audience will perceive what you are communicating
- Repeat your messages at every opportunity; just because you said it once does not mean everyone heard
- Make sure you have messages for specific audiences

**6. What materials will help tell your story?**

- Fact sheets
- Question and Answer (Q&A) sheet
- Talking points
- Supportive press clips, letters and documents
- Simple visuals
- Public Service Announcements (PSAs)
- Guest opinion (op-ed) pieces for newspapers

**7. What tactics should be considered?**

- Media outreach through:
  - ✓ Press Conferences
    - Precede with media advisory.
    - Follow with press release.
  - ✓ Press releases
  - ✓ Stage press events, “photo ops”
  - ✓ Guest opinion—editorials (op-eds)
  - ✓ Public service announcements
  - ✓ Briefings and presentations to editorial boards
  - ✓ Look into broadcast fax services for quick dissemination

**8. Other tactics that could be employed to reinforce your message:**

- Briefings and presentations to:
  - ✓ Policy makers or key decision makers.
  - ✓ Providers and community based organizations.
- Organize a speaker's bureau.

**9. Develop a plan, on paper, and stick to it.**

- Outline every activity and make sure someone is responsible; this holds true for everything from overall communication plan to individual events.
- Script every activity; designate who, what, where, when, why, and how.

**10. Budget your money, people and time.**

- Use your staff wisely. Take advantage of particular skills.
- Do not do more than you can afford; but do not skimp where it counts.

## Publicize the Project to the Community

The team should foster community support for the project by establishing a publicity campaign aimed at community members. The campaign should provide a process for educating the community about the project and generating additional community resources. In addition, encourage local media to publicize the project and those members, which are involved. Publicity should secure involvement and community awareness and potentially add stakeholders.

Any adverse publicity can diminish the credibility of the project. To overcome this barrier:

- Communicate accurate information to all members quickly.
- Let the sponsor serve as the public spokesperson.
- Identify and correct any inaccuracies as soon as possible.

Media sources vary in each area but may include:

- newspapers
- local magazines
- radio
- television

See “Fifty and One Ways to Advertise” in the Tools Section for more ideas on media sources, tool 4.



## Responding to the Media

We have been talking about situations where you initiate contact with the press, but there are also those times when the press seeks you out. How should you respond?

**For example:** The phone rings. It is a reporter with the Times. Small talk ensues. After a moment, you realize she is still working, and you have mentally clocked out. How

did the conversation swing from the weather to a question on a youth behavior risk survey in thirty seconds?

Reporters are pros. Like many business people, they work in a professional world where allies may one day be opponents. A reporter can slam your program and question your character, smiling all the way. They can be ruthless, opportunistic, highly competitive, and very clever.

At the same time, reporters are some of the best resources you have to inform and involve the public. You probably do not have hundreds of millions of dollars to advertise like McDonalds or Procter and Gamble, but you do have an interesting story about an important issue. Reporters know it, or they would not call. When they do pursue you, regardless of the premise, seize the opportunity to speak through the reporter to get to the general public. Remember, reporters are, generally, nice people who have a job to do.

### **When a Reporter Calls**

If you are ready, focused, have your basic messages in front of you, and feel well informed on the topic being discussed, start talking. If you're not ready, are apprehensive, need a few minutes to concentrate, develop a response, or get better informed, you do not have to respond immediately. Instead:

- **Find a way to stall.** "I am just saying good-bye to some guests. Can I call you right back?" Or simply, "I am just not prepared to discuss that issue right now; I will call you back in a few minutes."
- **Determine their time constraints.** "Are you on a deadline? I will call you back as soon as possible."

- **Find out why they are calling.** “Are you calling about something in particular?”
- **Seek advice.** Call the Office of Communication regarding legal issues affecting the Agency, personnel matters or situations that have or are likely to have serious ramifications for the Department because the Director needs to be involved.

The reporter may try to elicit a response anyway. “Can I just get one quick statement? My editor wanted this story an hour ago.” Be careful: off the cuff comments become headlines. You and the reporter are at odds here. She wants your candid response; you want to provide a well-thought-out answer. Call the reporter back when you are ready to talk and know what you want to say. Respect their deadline. If you wait too long, they may call someone else or write their story without your input or state that you either were unavailable to comment or refused to comment.

## **When a Reporter Finds You**

If you are confident and ready, take a deep breath and start conversing with the reporter like you would with a friend. Just be brief, positive and “on message.”

However, if you have any apprehension:

- **Stall: Say something to buy time.**

“I need five minutes and then I will be out to talk with you.” Or, “This is a complex issue that needs a coordinated response. Let me get the Communication Director to visit with you. She may direct you back to me for additional information or she may bring some other people in that have knowledge about this matter.”

- **Read a prepared statement.**

Sometimes, particularly when there might be legal matters involved, you may need to tightly control the message by writing, issuing and reading a prepared statement. These are most likely to be situations where the Director needs to be involved or at least informed so contact the Communication Director at 1-800-482-5400 ext. 2474.

## The Ten Commandments of Talking to the Press

1. You do not have to answer every question.
2. Stick to your message.
3. Do not speak from the cuff.
4. Do not get defensive; you're doing the right thing.
5. Admit when you do not have the answer to a question; always get the answer and call back.
6. Believe in your message.
7. Do not interrupt when others are conveying the message.
8. See your contacts with the press as an opportunity to tell your message to the reporter's audience.
9. Speak concisely and clearly so you will be quoted.
10. Acknowledge that reporters are only doing their job— respect their craft and aid them in finding your truth.

## **When A Reporter Wants an Interview**

Some people dread interviews, but they do not have to fear. If you are prepared, you can assure your message is accurately communicated.

### **In General**

For any interview, three strong, concise messages are enough. With the right examples and supporting facts, you should be able to link all your responses back to a few basic points.

- Prepare one page of “talking points” on your key messages. Read them, refine them, rewrite them, and rehearse them. Tape the talking points up where you can see them as you talk on the phone.
- Many stories are assigned within a tight time frame. This means a reporter often has little time to research the story before interviewing you. Never assume the reporter understands your subject. You should explain it to him or her as new information.
- In radio and television, journalists want a spokesperson that expresses ideas using few words. They are always looking for the five or ten second quote that highlights your side of the story.
- When a reporter calls you for information, always ask if he or she is working on deadline. Sometimes reporters are working a week in advance; other times they are one hour before deadline.

**Before the Interview**

- Be well versed in your subject. If possible, ask the reporter during the phone call what angle he or she is interested in talking about.
- Prepare short, simple answers and easy explanations in advance to anticipated questions. Think in visual terms. Review your talking points. Your message is your mantra.
- If the interviewer is coming to your office, find or prepare a good visual setting, maybe with a banner or logo behind you. Clean the place. Camera persons tend to wander around filming whatever happens; therefore, you could stage a visual by having people nearby involved in some interesting activity.
- Before the interview “officially” starts, try a little small talk with the reporter. You want to be personable and human.
- Prepare and practice talking in “sound bites” (15 to 30 second responses). You do not want to sound like a robot.

**During the Interview**

- Remember to breathe. Stay relaxed, focused and “in the moment.” Reporters never ask the exact question you have practiced, so be loose and ready.
- Reporters can be brusque and even rude. Do not allow yourself to be baited into a defensive reaction. The reporter is neither your enemy nor your friend. The reporter is just a liaison between you and your audience.

- Use your key messages and make two or three key points as early in the interview as possible. Remember, the media is looking to you for answers.
- You do not have to answer the reporter's question. Watch politicians. The most adept can always come back to their message, regardless of the reporter's question.
- If you do not know something, offer to research it and phone the reporter back with the answer before deadline.
- Remember who your audience is and speak as if you are talking to them. Do not use technical language.
- To borrow evangelical parlance, if your cause is just, you need to stay resolute in your righteousness. Without being defensive, always remember: you are doing the right thing; you are telling the truth; you are confident the public will agree with you.
- Never go "off the record" with a reporter. Never say anything to a reporter that you wouldn't want to see in the press. Play it safe.
- If an opponent is also present, avoid the temptation to rebut their comments; this dignifies their comments and detracts you from your message. You can respond when and if it is needed. Do not allow the opponent to start asking you questions except in formal debates. You are interacting with the reporter only.

**After the Interview**

- Sometimes a thank you note or a call is appropriate. Make a habit of recognizing good reporting.
- If a factual error occurs, you may want to call or write to the reporter. Gently suggest that the fact is not correct and give the proper answer.

**Special Tips for Radio Interviews**

- Remember in radio, “speak for the ear.” The listener will not have any pictures to support what you’re saying, only your words.
- In a live interview or talk show, treat the reporter like a friendly associate. Explain things to the reporter in a manner that shows interest and respect. Make your speech as conversational as possible, avoiding complicated answers and use of jargon.
- Be aware of noises. Do not tap pens or jingle your change.

**Working with Television Reporters**

- Get to the studio early so you can meet the host before you are on camera. Decide how you will address one another – formally or by first names (first names generally make you feel more at ease and tend to result in a more relaxed interview).
- Introduce yourself to the cameraperson before the interview begins. He or she has the ability to make you look good or bad. Remember, the way you look and sound is just as important as what you say, particularly on television.
- Talk directly to the reporter, never into the camera, unless instructed otherwise. Television is a very

intimate media. You are really in a one-on-one situation with the reporter interviewing you. Try to call the reporter by name during the interview (once is enough) to establish rapport.

- Be enthusiastic but calm, avoiding sweeping gestures. TV is a “cool” medium. What you do is amplified on the screen.
- Broadcast reporters work on tight deadlines, so they will be grateful if you are readily available for interviews when they call.
- Your answers should be limited to 15 to 20 second sound bites; any longer and it will get edited down or not used at all.
- You should be animated and colorful in your answers; use anecdotes to help illustrate your point.
- Look comfortable and professional in both body language and dress. Avoid loud patterns. Don’t wear white shirts unless you also wear a jacket.
- Phrase your responses as if you are talking to a friend and you will be less apt to lapse into “officialese.”

## Building Relationships With the Media

Media relations are easy: First you send out an advisory. Second you hold a successful event; and, third get ready to tape the news and clip the papers. Right? WRONG!

The essence of effective media relations is the relationship you make over time with an individual reporter. That is how you get press coverage, and that is how you improve your chances of favorable press coverage. Here are some key points to remember when working with the press:

- Reporters, while purportedly objective, have personal interests and ideas like anyone else. Like members of any other profession, some reporters will be easier to relate to than others.
- Be accessible and open with the news media. You should respond quickly to media calls of all kinds, and provide assistance as accurately and thoroughly as time permits.
- Tell the truth. The first time a reporter has a reason to question your integrity you will be stigmatized forever. Reporters are paid to have long memories and generalize about individuals and issues. Further, they talk to one another and trade stories.
- Call and introduce yourself to the reporter assigned to your issues. Make an offer to help out in any way you can, by forwarding information, keeping them apprised of new developments and introducing them to other people in your organization.

- Invite reporters you would like to know better to lunch or breakfast or some other semi-social activity so you can talk informally about yourselves and your work.
- Keep a log of media contacts. In a binder or notebook, track the date of contact, reporter's name, what was discussed, and any commitments you made to call back or send information.
- Never be a pest at deadline time. If you have the option, call reporters several hours in advance of their deadlines, but after they have had a chance to settle in for the day.
- If you need to call reporters right before their deadlines, tell them you know you are calling at a bad time and quickly explain the purpose of your call.
- Use your judgment on how often to call or write a reporter. You want to build a relationship, not be a pest.

## Task List

Before your first contact with the press, you should assemble a few basic tools that will enable you to easily reach out to the press, and respond quickly when they call. It takes time to develop some of these documents, but they are worth the effort.

- **Create a Fact Sheet**

If a reporter said, “sounds good, fax me some information” what would you send? Develop a one or two-page fact sheet, be brief and visually convey your main messages. Fact sheets are useful for the press and they may also be distributed to interested members of the public.

- **Create a Source List**

Suppose a reporter said, “Do you have any other good contacts I could talk with about this issue?” Who would you suggest? If you have a few good people who you can trust to stay “on message for quotes or background, list them on a Source List you can send to inquiring reporters. (Make sure it is okay with the source, of course.)

- **Write Talking Points**

Talking points are your main messages fleshed out on paper. They should be near you, physically or in memory, every time you talk to the press. All your staff supporters should use them. Talking points are most effective when they address no more than four main messages and total only one or two pages of large, twelve point or larger type.

- **Develop a Question and Answer Sheet**

The Question and Answer Sheet, or "Q&A" is your chance to field the most often asked questions about your issue with "home run" answers. The Q & A can be distributed to the public as well as the press. You may consider developing an internal Q & A where you create answers to the most difficult and controversial questions of which you can think.

- **Make a Press List**

Pull together a database of every media outlet in your region, including newspapers, radio stations, and television stations. Use any format that works for you, but consider everything you may need to quickly retrieve information about an individual outlet, including the media market, address, reporter's name, reporter's "beat," phone number and fax phone number.

- **Put Together a Press Briefing Packet.**

A press-briefing packet is a folder full of the documents you want a reporter to have within reach when they cover your issue. Starting with a simple, pocketed folder with your logo affixed to the front, the contents of your press packet could include:

- ✓ Letter of Introduction
- ✓ Fact Sheet
- ✓ Source List
- ✓ Calendar of Upcoming Events
- ✓ Your Business Card
- ✓ A Video (if available)
- ✓ Positive and Informative Articles or Editorials
- ✓ Brochures and Flyers
- ✓ Charts or Graphics, Color Slides (if available)
- ✓ Biographies of Speakers
- ✓ Black and White Photographs (if available)

## ✓ Question and Answer (Q &amp; A) Sheet

- **Reverse the Usual Communication Model.**  
Typically we use introduction, supporting data and conclusion. Instead, state your conclusion – your message – first. Follow with anecdotes, examples and facts, and then repeat your message.
- **Comply With Today's Sound-bite Requirement.**  
Limit your answers to any question to 30 seconds. Anything longer could mean two things will be lost—the reporter's interest and your message.

# Meeting with a Power Person

## Instructions:

Meeting with important people, or people who have important positions in the community, is a necessary and important part of the process. If not done correctly, it can also keep you from achieving your desired outcome, whether it is getting the person to join the coalition, to commit resources or to provide information. These questions will help you determine what you know about the person or organization and what you need to learn before you contact them. Not every question is appropriate for every meeting. Choose those that make sense for your purpose.

## Background About the Organization

- Do you know the key people in the organization?
- Do you know the strengths of the organization?
- Do you know goals of the organization you support? Oppose?
- Have you researched the structure of the organization?
- Have you learned buzzwords and titles within the organization?
- Have you read press clippings and handouts? Compare early and late items and noted differences such as a change of goals, objectives, and strategies.
- Have you learned all you can about the person you will be talking to?
- Have you consulted others who know the person or organization?

### Preparation

Many people you contact will have lots of questions. It is important that you are prepared to answer them. Consider these points and be prepared to answer questions related to them.

- Who else will be involved?
- Who will not be included?
- Why?
- Why not?
- Where will meetings be held?
- Other possible locations?
- When will their participation be needed?
- Other date options?
- What is the goal of the project?
- Other options?
- Who benefits?
- Who loses, who pays?
- Who decides?
- Who will have input into decision?

It is a good idea to jot down notes, questions, and points you do not want to forget when you meet with this person. Here is a checklist to help you decide if you are prepared for the meeting.

- Have you put your questions in logical sequence?
- Keep your prime goal of the interview in mind.
- Have you reviewed all your materials?
- Test your questions with yourself. Ask yourself if questions will bring out what you want.
- Have you tested your question outline with a "Devil's advocate?"
- Are you dressed and groomed to strengthen confidence?
- Do you believe in what you are doing? At the same time, are you able to remain objective and non-emotional?

- Have you taken the time to relax and rest before the meeting?

### **At the Meeting**

- Are you prepared to take notes?
- Are you staying on track?
- Are you making sure you understand what the person is saying?
- Are you watching the clock to make sure you go away from the interview with answers to your priority questions?
- Are you absorbing each response before continuing with the next question?
- Are you listening to what was not said? If omission is important, direct question to omission.
- Have you thanked the person you are meeting with?

If for some reason you have not been able to finish, but the time for the meeting is up, acknowledge this and set up an additional appointment. They may say they can continue at the present time, but at least you have let them know you realize they are busy and do not want to interfere with their schedule. This could be important if you want them to commit valuable time in the future.

## Writing For Your Coalition

It is almost inevitable that you will be asked to write about your coalition and its activities at some point. You may be asked to write a report for the quorum court or a summary for your team leader. Whatever the request, do not panic. Many of us have not done much writing since school, but if you follow the following basic steps you will find that it really is not so difficult.

Many people face writer's block when asked to write something. You may know the feeling as you stare at a piece of paper or the blank computer screen because you have no idea what to say. If you think about your assignment as a journey it helps. First, prepare by thinking about where you want to go and the best route to take. Otherwise you risk driving in circles, wasting valuable time and energy and losing your readers along the way.

### **Decide the Focus and Purpose**

Before you start writing, determine your objective. Do you want to persuade, to inform, and/or to sell? What results do you want? You have to know why you are writing the report and what you hope to accomplish if you want it to be effective. Once you decide this, choose the appropriate tone: friendly, serious, casual, formal.

### **Understand Your Audience**

Evaluate your audience: What information matters most to them? How much time do they have to read? How receptive will they be to your information? Will you need to provide background data or explanations, or is the subject familiar to them? You must identify what to include and what structure will work best.

### Collect and Sort Your Information

Now that you know what you have to tell your readers, write a one-sentence summary for each of the main points. Use them as the basis for your outline when gathering information. You can use the traditional outline form with Roman numerals. Or you can put each sentence on a separate page and list related facts below that topic.

Having trouble deciding what the summary sentences should be? Use the mapping method: List every idea that may pertain to the overall report. When you have run out of ideas, highlight the most relevant ones, and link supporting thoughts with the primary concepts. Then rearrange the ideas into a rough outline.

The next step is to choose an appropriate structure for your report, deciding how the information will flow. Some choices:

- **Order of importance (most to least or least to most):** reporting information or offering recommendations.
- **Chronological order:** summarizing the history of the situation by stressing its relationship to time.
- **Sequential order:** detailing information in a step-by-step pattern.
- **Comparisons:** summarizing similarities and differences, or advantages and disadvantages.
- **General to specific:** informing, instructing or persuading your readers by moving from the “big picture” to a more detailed view.
- **Cause-and-effect analysis:** explaining what happened and why.

**Write Your Draft**

Now that you have selected your structure, write your first draft. As you do, make sure the information is consistent

with your goal and purpose. Be ruthless—cut any unnecessary information.

If you have many facts to present, or a chronological listing, use graphs, bullets or numbered lists instead of all text. This makes the copyreader friendly. If your document is long, use subheads to break up the text and provide readers with “signposts” to keep them on track.

Within the document, lead your readers from one paragraph to the next using a bridge (transitional phrase) instead of pushing them off the cliff. Some common transitional phrases are: then, on the other hand, but, yet, and, meanwhile, for example, as a result, in addition, in conclusion, and of course. You can also use sequential phrasing if appropriate: First, Second, Third, Finally.

*Always have someone else read your report for errors and clarity.*

**Revise Your Work**

First, if you are using a computer or word processor, run spell check. Remember it only catches words that are spelled wrong not the wrong word so do not rely on this alone. Take a break from it for at least 30 minutes (overnight is best). Then read it once again to check for repetitive phrases and misspelled or incorrect words. Pay extra attention to dates, numbers and names, verifying against the original source.

How does the writing sound when you read it aloud? Did you write with your intended readers in mind, staying aware of their familiarity with the subject? The bottom line is: Did you get to the point? If you can answer, “Yes” to these questions, then you have reached your destination.

**Beware of These Potholes**

- **Inconsistent Parallels**

Be sure to use the same kind of phrase or clause to begin each item in a series. Example:

“Developing, testing, and implementing the concept.” Not “Developing, testing, and implementation of the concept.”

- **Misplaced Modifiers**

To avoid any unintentionally “funny phrasings,” place the descriptive word or phrase as close to the work it is describing as possible. For example, do not write a sentence such as, “Despite being filled with gas, he still had trouble getting his car started.” Try instead “Despite the fact that his car was full of gas, he still had trouble getting it started.”

- **Incompatible Numbers**

Watch subject/verb and subject/pronoun agreement. If one is singular, the other should be as well. Do not say, “If one wishes to go downtown, they must use the detours.” Instead say, “If one wishes to go downtown, he or she must use the detours.”

- **Spelling Zingers**

Beware of transposed letters that still form words, such as “was” for “saw.” Also, many spell checkers do not catch single letters, such as “a” for “as.” Consider customizing your spell checker by adding industry terms and employee names that you will likely use again.

- **Negativity No-No’s**

Avoid negative phrasings whenever possible.

Example: “He is not running for Congress.”

Reason: Many people skim when reading and may

miss the “not.” Better yet, use a contraction instead on the two-word negative (isn’t instead of is not).

- **Word Clutter**

Make sure your writing is clear and easy to follow. Resist the urge to dazzle your readers with multisyllabic words and jargon. Instead of “It has come to my attention that the designated area for employees’ vehicles has become insufficient for our needs,” try “The company parking lot is too small.”

# Methods of Contacting Potential Participants

Why is it important to contact potential participants?

It is important to contact new members simply because they are usually not going to walk through the door, or show up uninvited, though that can happen. Normally, they are not going to come to you. You will have to go to them. To put it plainly, most new members for your group or organization will need to be recruited. The main question in this section is “How should I recruit them?”

Actually, there are two separate questions here. One deals with the method of your contact. That is, what form, or approach, should you use to contact and recruit new members? And the other deals with the content of your contact. That is, what points should your message convey? Let’s take up these two questions in turn.

## What are the methods for contacting potential members?

When you begin contacting members, there are at least three basic methods to choose from. You can:

- Meet them face-to-face
- Call them on the phone
- Write them a letter

There are other methods, too—you could send a fax, or an email message. You could send a fact sheet, flyer, or brochure. But for now, we will focus on the three main methods above. How should you make your choice?

## **How do you decide which method to use?**

There are advantages to each method, and some drawbacks too. You must look at the advantages and disadvantages of each, and then decide which method is best for you. Here's what we mean:

### **Face-to-face contact**

Our experience is that personal contact works best. Research findings back this up. The more personal the contact, the greater your likelihood of success. A face-to-face meeting is more likely to be successful than a phone call, and a phone call is more likely to be productive than a letter. Does this mean you should make face-to-face contact in every single case? Not necessarily. This is because:

- **Personal contact takes time.**  
Suppose you want to have a meeting: it takes time to set up the meeting (assuming you are arranging one in advance), it takes time to travel to the meeting, and it takes time to meet. You may simply not have that time to give for each potential member.
- **Personal contact is not always possible.** The person you want to meet may not be available to see you, or frankly not be interested in seeing you. This is especially true if your potential member has a highly visible or important position, and if your group has low visibility in the community or is unknown to your target.
- **Personal contact may be less necessary.**  
When you are asking your target person to do something small—to agree to be listed as a sponsor, for example, or to make a small

contribution personal contact may be less necessary. These are “passive” forms of membership, rather than “active” ones. The smaller the request, or the less involving it is, the less intensive the contact needs be.

### **Telephone contact**

The telephone is quick and easy. You can dial seven digits in under five seconds. You (and your prospective member) do not have to travel—you can sit right where you are. You can engage in two-way dialogue, just as in a face-to-face meeting. You can listen and respond to emotional tone, not just verbal content, by sensing changes in voice pitch and inflection. And you can get your business done promptly. These are all major advantages, but it may be hard to reach your target person. When you do connect, the target person may not be giving the same attention and consideration to your call as in a face-to-face meeting. A phone call usually cannot build as strong a connection as a face-to-face meeting.

### **Contact by letter**

Letter and print contacts, on the other hand, have distinct advantages. While a good membership recruitment letter takes time to write, it can sometimes express what you want to say better than speech because you have taken the time to write it. Once the letter is written, the basic content can be used more than once. You can generate many letters in a little time. From the recipient’s point of view, the letter can be read at leisure, and kept on file for future reference.

On the other hand:

- Even the best letters are not as personal as a phone call or meeting
- There is no two-way dialogue
- There is less opportunity to respond to individual concerns, and to develop a relationship
- And (the shocking truth) some letters are never opened at all

So each of these contact methods has positive and negative features. Okay, but how do you resolve the issue? What method should you choose in your situation right now? We would like to provide an all-purpose answer. But in fact, we do not believe there is one. Instead, the answer to the question depends on your situation.

### **Factors in your decision**

Here are some situations when you really might want to put the effort into personal contact, and in meeting face-to-face when:

- You have a small number of people to recruit
- You have a large number of people to recruit - delegate
- You have the time available to make the contacts
- The person you are recruiting would be an especially important member for your group
- The person you are recruiting is a particularly influential member in the community
- When the person you are recruiting does not know you or your group very well

A phone contact might be the best choice in these cases when:

- The prospective member is unavailable (or unlikely to be available) for a meeting
- The prospective member is relatively easy to reach by phone
- You and the prospective member are already acquainted
- The request being made is relatively simple
- You are personally comfortable speaking to others over the phone

And, as an alternative to the phone, here is when a letter might be strongly considered when:

- You have a relatively large number of members to recruit
- You are the only person available to do the job
- Your own time (and your group's time) is very limited
- It is less important who in particular the new members are
- The prospective member is already familiar with you or your group
- You have developed (or are given) an excellent mailing list

### **Combining different methods**

At this point, we have good news (we hope). It is possible to combine these different contact methods. For instance, you can:

- Call, then write
- Call, then set up a meeting
- Write, then call
- Write, then set up a meeting

And, to expand the point, you can add a third stage, as well. That is, you can call after you have sent a letter or write after you have met. In other words:

- Call, write, call
- Call, meet, write

Many other variations are possible, but these are enough for now (we don't want things to get too complicated). In many cases, combining methods is a good idea. A precise discussion of the exact sequence of events takes us beyond the scope of this module. The main point is that it is possible, and often desirable, to combine different methods when you are asking members to join your group. Each method can support and build upon the strengths of the other. In many situations, using a well-thought-out combination of methods may be worth your time and trouble.

### **Adjusting your method to fit the situation**

We'll wind up this section with more helpful method tips. You do not have to stick to a single method all the time. Your strategy can vary: you can use one contact method for some people, and another method for others. The saying goes "Different strokes for different folks". It is the truth.

### **Taking advantage of chance**

Before we conclude, there is one more contact approach to list. It needs to be mentioned, even though it is not exactly a “method”. We will call it chance. You might run into a potential member at the post office, or at the football game. You might see that bank president picking up the newspaper, or at church. If it is not out of place to approach them—and maybe it is not—then take advantage of those chance opportunities. In unplanned encounters, when people are not in a hurry, many people will show their natural and helpful selves. They may be more receptive to what you want to tell them. Good community work means being prepared to take advantage of every opportunity presented to you, whether by chance or design.

### **To sum it up**

Meetings, phone calls, and letters can be seen as just part of an overall membership strategy, with each to be used as needed. If several good methods exist, why limit yourself to just one?

## Writing a Letter to Potential Members

Making personal contact with potential members is best when possible. The more personal the contact, the greater your chances of success. This is especially true when the potential member knows, likes, and trusts the person doing the contacting. Letters definitely have their place. There may be too many potential members to go see everyone, or you may know that certain people prefer a letter to a personal visit. A good letter can be strongly influential, often more so than a mediocre meeting. Letters can also be kept and referenced.

A letter used to recruit new members for your group or organization may vary in format from a general form letter to a more personal handwritten note. Usually it is mailed, but it can also be printed in a newsletter or local newspaper, or even sent by fax or e-mail.

### **Why should you write a letter to a potential member?**

Because, as with any membership contact method, your hope is:

- To recruit new members into your group or organization (the main goal)
- To raise awareness of your group and the issues that are important to it
- To give potential members a written overview of your organization that explains its purpose, highlights common interests, and suggests areas of possible involvement
- To ask for specific assistance on specific programs or projects

### **When should you write a letter to a potential member?**

You should consider writing just about anytime you are trying to increase your membership size or your

community recognition, or when you need more organizational help. But especially:

- When you do not know the potential member well enough to make a personal contact
- When it is difficult to reach the potential member on the phone
- When you want to convey some detailed information about your organization that is too lengthy or complex for a phone call or meeting (this can go in a fact sheet or brochure, which the potential member can keep on file)

**A letter can also be used in connection with a personal meeting.** Letters and face-to-face meetings can work together. So write a letter:

- When you want to have a personal meeting, and think that sending a letter will help you get that meeting.
- When you want to follow up after a personal meeting, with a thank-you; or with further information; or to confirm agreements made; or to reach agreements in the first place.

**How should you write the letter to a potential member?**

Before you begin, two important preliminary steps:

- You should have a good list of potential members.
- You should have set aside the time to do the writing. It can take time to do it right! Be prepared to revise it more than once.

Now, before we get to the heart of the matter, let's remind ourselves that there are different kinds of letter-writing situations:

- Sometimes you will be writing a letter to a friend. Sometimes it will be to a colleague, or to an acquaintance. And sometimes, you will be writing to a stranger, someone you don't know at all.

- In some cases, the letter might be your only membership contact method; it will stand-alone. In other cases, the letter will be connected to a meeting, and will be sent either before the meeting, or after it -or, possibly, both before and after (see Methods for Contacting Potential Members).

Depending on your situation, the content, style, and tone of your letter will vary. Naturally, you will write to a friend differently than to the Superintendent of Schools. But all letter-writing situations have one big factor in common. In all situations, your task is to write a persuasive letter, designed to convince the recipient to join and be part of your outstanding group or organization. To do this well, you want to use persuasive skills. There's nothing wrong with that. If you have a good cause (and it is good -otherwise you wouldn't be part of it), you have a perfect right, and maybe even a responsibility, to attract others to it. All of us do have persuasive skills. Virtually all of us have written letters asking someone to do something. It is not as if you've never written a persuasive letter before. Furthermore, you can get better at it by following some simple guidelines. These are some general principles of persuasion, which apply almost all the time. Let's review what they are:

### **Get the reader's attention**

The busier your reader is (or the less your reader reads) the more important this point becomes. Attention comes first. If you don't get attention, the reader isn't going to read the letter in the first place, or even open it.

How do you get attention?

### 1. Design

Consider using:

- A distinctive envelope or stationery.
- High-quality stationery, which may be worth the extra few pennies.
- A logo, especially a familiar logo, so that the reader knows the sender.
- Color, now that color printers are more affordable.
- A slightly larger-than-average type size (for example, 13-point, vs. 12-point or less).
- A distinctive typeface, as long as it is attractive and easy to read.

All of this can be done without being over dramatic, or offending the reader's taste.

### 2. Content

The first sentence is probably the most important sentence in your letter. Write an eye-catching sentence, one that is going to stick in your reader's mind.

Your communication is like a resume or like an advertisement for yourself and your organization. But in this day and age, the writer has less time to make an impression. Do you think your reader is going to read your letter slowly and carefully, savoring every single word? No, he or she is going to scan it quickly, if at all. The hard truth is the life expectancy of a poorly written letter is about five seconds. That is why we have wastebaskets, and people to empty them.

**3. Personalize the letter.**

Use your contacts. For example, when writing a letter you might add, "Y (a mutual friend) suggested that I might write to you, because...." This personal touch, if it is legitimate, often works well; we will pay attention, out of respect for our friend. But even if Y does not exist, you can:

Give the person's name in the salutation (as in, "Dear Patricia," or "Dear Ms. Prospect," as vs. "Dear Friend"). This is easy enough to do on your computer, even if you are writing many letters. It's worth the time.

Use a handwritten signature. Sign your own name. Stick a handwritten postscript at the end, or a handwritten lead-in on the top, or add a personalized remark. This might reinforce your interest, or add reasons for joining.

Hand-address the envelope. Do whatever it takes to get across that the reader is an important person, deserving of personal communication, for the reader alone, and that you know this, and have taken the extra care to ensure it. Now that you have got your reader's attention, your next task is to keep it.

**4. Give the reason you are writing in the beginning.**

Get right to the point. If this were a detective novel, you might hold the reader in suspense. But now your reader is probably at the office, with less time for mystery. Get to it. Save the theatrics. Most readers will appreciate it.

And what is your reason for writing? Your basic reason is to encourage them to become a member of your organization, in one way or another. There may be

variations in how you say this; but membership is almost always the bottom line, and stating it should come close to the top.

### **5. Give your reader good reasons to become a member.**

These reasons should be presented through the reader's eyes, as best you can see through them. What are the benefits for the reader? Why is it in the reader's interest to work with you, or even keep reading further? Important: You need to be clear on those reasons before putting finger to keyboard.

There is a common list of benefits -reasons for joining - that applies in most cases. In your communication, you should be able to choose one, and usually more, from the list below:

- The chance to address an important problem which concerns the reader or the reader's organization.
- The chance to help others that the reader is concerned with.
- The chance to meet people through your group that can benefit the reader.
- The chance to learn about new sources of funding for the reader's organization.
- The chance to stay current about what is going on in the reader's field.
- The chance to stay current about what is going on in the reader's community.
- The chance to meet new people.
- The chance to strengthen one's self-worth or esteem.
- The chance to be part of a pleasant social group, and have fun.

If you cite these reasons well, the reader may think, "I am a lucky person to have gotten this letter." That's exactly what we want.

Now here is a tip for all letter-writers, to make life much easier. The benefits you list will not change much from setting to setting. This is because benefits are keyed to human motives, and human motives are fairly constant and uniform. Still, there may also be specific benefits that apply to your particular organization. What are they? Don't hide them. Set them right out, very concretely.

In your letter, you can include a few sentences about your organization, and about the issues that it is dealing with. **But do not include too much detail in the letter itself**; it is not likely to get absorbed, and it may take away from the letter's overall strength. Instead, put your detailed information in a brochure, fact sheet, or flyer that will accompany and supplement the letter, and which also can be duplicated for others to read.

#### 6. Make a request.

What is it you want the reader to do? You do not just want good will from your letter. You want action. So let the reader know what action you want him or her to take.

Is it to come to a meeting of your group? To sign up as a formal member? To get involved in some specific project? To send money? To support you in some other way? Or is your letter more of a preliminary contact, one which seeks a meeting, or which is a prelude to a call?

*Instead of:*  
*"Become a member of our organization"*  
*Try: "Come to the meeting next Wednesday at 7:00."*

*Instead of: "Help us in our campaign."*  
*Try: "Spend an hour making calls before Election Day."*

*Instead of:*  
*"Distribute flyers around town."*  
*Try: "Distribute 50 flyers on your block."*

Be thoughtful in advance about what you are requesting. Of course, you can shoot for the moon, but the moon is far away. Instead, successful requests tend to have common characteristics:

- They are clear. The reader knows what is being requested.
- They are specific. The reader is asked to perform a particular act.
- They are limited. Lifetime commitments are mainly for marriage.
- They are immediate. They ask for something the reader can do right now, or very soon, rather than in the indefinite future.
- They are doable. The reader can comply with your request without a large expense of time, energy, money, or other resources. The request is feasible. Its cost is low, or at least affordable. The reader says, "I can handle it," or "I can do this much."

#### **7. Tell the person how to fulfill the request.**

What is the next step to take? Again, make this very specific. By this time, the reader may be sympathetic and willing. Let's hope so! Now, make it easy for the reader to act.

- If it is a matter of returning a form, enclose the form with an addressed stamped envelope.
- If it is a matter of coming to a meeting, make sure the time and place are prominent.
- If there is a deadline, state the day and date.
- Include your address, phone/fax, and best time to call.

**8. Express your appreciation.**

Thank the reader for considering your request, and for the reader's anticipated support. Do this in a natural way; say what you feel. You can also strengthen your appreciation by personalizing it at the end of the letter.

There is no need to overdo it. If there are any rules of social behavior, they are:

- We like to be appreciated;
- We never grow tired of being appreciated; and
- Showing appreciation increases support.

Much of social life follows from this simple wisdom. You should be appreciative; someone is helping you out. Showing appreciation here is the right thing to do.

**9. Proofread your letter.**

For many recipients, spelling, grammatical, and factual errors will lower your credibility and take away from the impact of your letter. You have come this far; finish things up in good form. It is often a good idea to have someone else proofread too.

These persuasive principles above do not have to be included in exact order, by the numbers; but your letter (or fax, or e-mail) will be stronger if they appear somewhere. This is because basic principles of persuasion do exist; they apply almost universally; and they work.

**Should you use electronic mail to send your letters?**

If you have the computer capability, it is very tempting to use electronic mail ("e-mail") and send all of your correspondence via the computer, assuming your recipient has an e-mail address.

**Advantages:**

- It is much faster than normal mail. This also makes it possible for the recipient of your letter to respond, via e-mail, much more quickly.
- It saves the trouble of addressing an envelope, buying a stamp, and mailing your letter.
- The letter is much less likely to get lost on the receiver's desk.

**Disadvantages:**

- For some recipients, it has less stature than a formal letter. It may carry less weight, and seem less impressive.
- If the recipient does not read e-mail regularly, your timesavings are lost. And unless the recipient goes through the trouble to print your message, it may be gone forever with one tap of the delete key -- and gone from your recipient's mind as well.

Of course, your e-mail can be supplemented by other recruitment techniques. But if you are thinking about using e-mail to recruit potential members, make sure that your target person is an e-mail user, and take special care to make sure that your message stands out. It may also help to let the recipient know in advance that your e-mail is coming.

Do the same persuasive principles apply when sending e-mail? Yes, they do. Maybe even more so, if you want to ensure that your e-mail message stands out from all others.

Write your own letter using the example Insert following this page. See our examples of letters to potential members in the Tools Section, tools 5-11.



## Preparing a Press Release

First, keep in mind what a press release is. It is a brief written summary or update, alerting the local media about your group's news and activities. Press releases are similar to news articles in that they inform the public, but people like you who are working in specialized fields, like community development or public health usually prepare them. You probably know by now that it can be difficult to tell the community what you are doing, and what you are about. A press release is one way for you to reach out and tell the community (for example), "We are the Howardsville Healthcare Workers for Healthy Hispanic Children, and we are trying to develop a scholarship fund to help low income Hispanic children go to college."

### **Like a news story, press releases are:**

- Created to either preview an upcoming event or inform the public about something that has already occurred
- Written in a clear, concise manner that easily and quickly conveys its message to the reader
- Written with the most current and pertinent information in the first two paragraphs
- Subject to editing for content and space or time requirements, depending on the media

### **Unlike a news story, press releases are not:**

- Always a high priority for media producers to cover
- Written by professional journalist

**How can a press release help your community coalition?**

It can:

- Announce your event, study, campaign, workshop, or election of new leaders
- Tell people why you think this development is news
- Show your perspective on the development
- Increase the visibility of your leaders (if quoted in the release)
- Remind people of what your group does and how active in the community you are
- Allow you to highlight or summarize a report

Before you start thinking a press release is going to solve all your publicity woes, now is a good time to note that by itself, a press release is not going to get you any media attention. The average reporter or editor gets more press releases than he or she could possibly use. Your press release should be just one part of your media campaign.

**When should you prepare a press release?**

You and your group should consider press releases only when you have news that you want the public to share.

For example:

- News of upcoming public events
- Reports of recent public events
- Reports of organizational changes that may be of interest to the general public (i.e. a merger of two organizations; launching of a new teen chapter)
- Reports of awards, prizes, grants or publications connected with your cause
- Reports of hiring or promotions of staff members, particularly top managers
- Announcements of recruiting drives for volunteers

If you have no hard news, you may want to create some. For example, if a national organization announces facts that are relevant to your cause, you could make a good story by asking local experts for their reactions.

### **How do you prepare a press release?**

To start, you'll need a typewriter or word processor. This probably sounds like the obvious, but unfortunately some people hand write the release. A typed release looks more professional and is easier to read than hand-written ones. This increases the chances that the editor who receives it will give it consideration.

Next, you need to have a story to tell your community. The story should focus on what your group is currently doing or doing in the future, not something you did last month.

Press Releases should read like news articles. It is sometimes helpful to study news articles in your local paper. News articles will have the five Ws and the H in their beginning paragraph. This is called lead. These basic elements are:

- What happened?
- Who did it?
- Why it happened?
- Where it happened?
- When it happened?
- How it happened?

See the Outline for a Press Release in the Tools Section, Tool 13, in this guide.



**Emphasize what makes your release important.**

What in your release is going to grab people's attention? Why is it important to the community? Why should they care? One or two of the basic elements above should be emphasized. For instance, if the mayor were going to speak on the issue at your event; it would be a good idea to emphasize the "who." If your event were the first charity fundraiser at the new recreation center, the "where" would be emphasized.

**Be as proactive as you can.**

Most media, especially in large cities, get tons of releases every week, so you want to make yours stand out. Find an eye-opening aspect to your release, or at least make sure your points are strongly emphasized. For example, perhaps pro-life and pro choice activist groups are working together on teen pregnancy prevention, or real estate groups and housing activists are working together on a housing initiative. Both might be unusual situations making them newsworthy.

**Make the headline and lead as clear as possible.**

They need to hook the reader quickly, or the release will be skimmed over and forgotten.

**Make your release look professional.**

Credibility is very important in an editor's decision to read or pass over your release. Letterhead and formatting should look professional, with no typos. The release should also have short, easily readable sentences and paragraphs, as news articles do.

**Consider sending other materials with your release.**

If you have already had contact with a reporter or editor, you may want to send a short cover letter reminding him or her of your previous conversation. Maybe you know this reporter has a personal interest in your issue. The key is to try and personalize the release, so it gets the editor's attention.

**Format and technical guidelines for your press release.**

Here is some common formatting and technical guidelines we have gathered from experts in the field. There are a number of possible formats, but here is some of the more widely accepted.

- **Use a dateline** - Like in many newspaper articles (for instance "Washington, D.C., Oct 15").
- **Spacing** - Double spacing makes your release easy to read. Short paragraphs with space between each and wider than normal margins also helps.
- **Length** - Your release should be relatively short – two pages, max. Subheads are also useful to grab the reader's attention.
- **Attachments** – A summary of the key points or other background information can help the reporter write the article.
- **Quotes** – Several quotes should be included. Try to make quotes sound like they were said, not written. For example, "The critical finding of the report is that many banks ..." is not as effective as "This report shows that our banks are ignoring the needs of..." When you are quoting someone, put the name after the quote. For example: "We have been especially pleased with the help and

involvement of our parent teacher organizations in collecting signatures for the petition,” Joyce Temple, director of Minneapolis Families against Violence, said.

- **Jargon** – Avoid using jargon or acronyms such as “Section 8 subsidies, CDC, GAA”. Most readers will not know what they mean. There are many we use so much we do not even realize we are using them.
- **Spell out the names of organizations that normally go by acronyms** - You can refer to them by the acronym later on in the story, but the first reference should always be the name.
- **Active verbs** – Use active verbs rather than passive verbs to keep the reader interested in your story. Active verbs are words that show that someone or something takes an action, such as, “State delegates from the National Organization of Women marched on Capitol Hill today demanding better health care for single mothers”. In this sentence, marched is an active verb showing movement. Passive verbs show that someone or something is being acted upon, such as in the sentence using the verb be: “Senator Jones will be in Kansas City this weekend for the 14<sup>th</sup> annual Festival of Cultures”. Here is another example of how active verbs can keep the reader interested in your story. “The Citizens Against Tobacco will jump into the fight against teenage tobacco use at the Cancer Awareness Week fair on Saturday”. Instead of “The Citizens Against Tobacco will be at the Cancer Awareness Week fair on Saturday to talk about teenage tobacco use”.

- **Numbers** – If you include numbers or statistics in your article, spell out numbers and percentages less than ten. Numbers or percentages above ten can be written as numerals.
- **Sources** – Double check your sources, for accurate quotes, correct professional titles, and correctly spelled names.
- **Edit** – Edit and re-edit your press release before you send it out to reporters. Do not just rely on spell check, have someone else not involved read it for typos, clarity and content.
- **Follow-up** – Computers and people are imperfect, it is a good idea to follow up any distribution of a press release with a phone call to your contact to ensure your release hasn't been lost or forgotten.

### **How do you get your press release out to the media?**

There are several different ways. In your local community, you, or someone who has a good relationship with your local paper, are the best, and most effective ways to get your story out. If you do not already have a good relationship now would be a good time to start developing one.

The Arkansas Department of Health Communication Office 501-661-2747 also maintains a mailing list of all the media outlets in the state. You can also identify logical contacts such as a reporter who seems to be interested in health issues or community issues by reading your local paper or following the radio and television news. They will appreciate being kept posted, and may help you to get coverage even if they do not personally cover your release.

*Mailing a release too early is just as bad as mailing it too late.*

It is also a good idea to call your local media and explain to them who you are and what your group is about. Ask them whom your press releases should go to. Never send a release to more than one person at the same newspaper.

### **When should a press release be sent?**

As with many things, timing is crucial when sending your press release. Three to five days in advance is usually the right amount of time to ensure the editors can put someone on your story. Mailing a release too early is just as bad as mailing it too late. It will be put aside and forgotten. If your story is last minute, you may be able to telephone it in. Deadlines do vary depending on the type of media, so be sure and check with them in advance.

Also think about how often your paper comes out. Some communities have weekly papers and some daily. If it is a weekly you will have to have the release ready by the deadline or wait another week. Be sure and find out the deadline for your paper.

### **Follow-up**

Things can get overlooked or forgotten, so it is a good idea to telephone everyone to whom you sent releases to increase your chances of getting covered. Call your personal contacts and reporters you have worked with in the past in advance so they have more time to be free to cover you. When you follow up with the reporter, be sure to include any last minute news that was not added in your release.

**When should you call?**

- If your event is 10:00 a.m. to noon, call from noon to 4:30 p.m. the previous day
- If the event is noon to 2 p.m., call from 8-9 a.m. the same day, or 3:30 –5 p.m. the previous day
- If the event is from 3 p.m. to 5 p.m., call from 8 -- 10 a.m. the same day

In other words, make sure the news agency you are contacting has at least three hours of work time before the event to prepare to send a reporter.

There are examples and tools to help you write a press release in the Tools Section of this guide, Tools 12-13.



# Preparing for a Successful Meeting

## Building the Agenda

*An agenda is a roadmap to guide the meeting, which the group can amend as it moves through the meeting.*

Planning an agenda is the process of designing the flow of topics, process steps, and time necessary to accomplish the desired outcomes of a meeting. The major product of agenda planning is a written agenda, which serves as a logical roadmap for the meeting. Here are a few guidelines one should be aware of when planning an agenda:

- Effective agendas contain as few topics as possible so that each can be addressed in the necessary depth.
- Make a first pass at listing all agenda items, working out a process for each one and making time estimates, but not worrying about the order of agenda items.
- An agenda that is not fully understood by the group is not a useful agenda.

The agenda helps meeting chairpersons prepare for a meeting in a detailed and concrete way. It helps meeting participants know in advance how they can participate in the meeting. It provides a flexible guide for the meeting and an aid in measuring success at the end. You must be explicit about what is going to happen, how the meeting is going to be run and who is going to play what roles. It is a good idea to mail out a detailed agenda at least a few days (preferably a week) **before** the meeting. If participants receive an agenda before the meeting, they will come prepared. Because most of the procedural questions will have been settled in advance, your meetings will be shorter and more effective.









You have just completed a detailed agenda that you can use at your next meeting. Some other items to include on the agenda are:

- **Name of group** – Most groups have a name: Middle School PTA, Executive Committee, or Board of Directors. Consider giving your group a name as this can help build a sense of identity and importance.
- **Title of meeting** – Most meetings have a name or description: weekly staff meeting or budget meeting. The title usually conveys the general topic of the meeting and it helps distinguish between different meetings that your group has held or is planning to hold.
- **Date, starting time, ending time and place** – Obviously, when and where are essential pieces of information. Make sure to include the number or name of the room. Again, putting a time frame on the agenda will let people know that you respect their time.

Now take a moment and use the form located behind this page to fill out your agenda using the previous activities located on the sides of your pages. Also, located in your Tools Section is a blank copy of the agenda form and various examples of agendas (Tools 14-17).



## Preparing the Room

Where you meet can affect the way a meeting will work. A good meeting room will not guarantee a good meeting, but a bad meeting room can contribute to a bad meeting. Choosing a meeting room can be a difficult task. It is important to remember to make a high and low estimate of the number of people expected, and then choose a room that fits the group.

When choosing a meeting room, you should also be aware of WHO is going to be at your meeting. For example, if rival school districts are in your group it might show favoritism toward one of the school districts if you are meeting on their campus.

Meeting rooms should be chosen so that they adequately reflect your group's needs. If your group is very large, parking is a major factor when people are deciding if they want to attend your meeting. If they know that parking will be a hassle, they might choose not to attend the meeting.

*No matter how important your meeting is, it may still be non-productive if it is not supported logistically*

Listed are just a few other factors to consider when choosing a place to hold your meeting:

- How close are restrooms to your meeting room.
- Is there a charge for parking.
- How far will participants have to drive to your meeting facility.
- It is also important to consider members with special needs and disabilities.

Physically visit the room. **DO NOT** rely on word of mouth or diagrams to give you an accurate description of the room. Visit the room early, so if changes are needed, you will have enough time to notify participants. Visiting the room will also give you an opportunity to look at the location of electrical and telephone outlets. When you are visiting the site, take time to map out different ways to arrange the room.

## Room Arrangements

How people sit, whether they can hear, whether they are hungry or tired can make or break your planning process. As a facilitator, the logistics of the meeting should be of great concern to you, whether you are responsible for them or not.

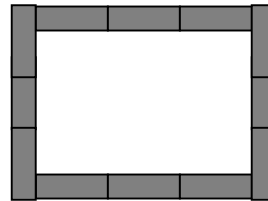
Physical distractions can undermine the best of intentions. Poorly designed room arrangements contribute to unfocused meetings. A well-designed room allows the audience to stay focused on the meeting. A room setup is helpful when it allows for:

- Wall space or a flipchart easel for the group memory.
- Movement of chairs so that the group's focus can be adjusted easily.
- Enough space so members are comfortable.

The arrangement of a room includes the seating, lighting, focus, and placement of equipment. Room arrangements can either contribute to or detract from a group's effectiveness. Temperature, light, and noise also play a major role when setting up the room.

## Seating

Having chairs in a circle or around a table encourages discussion, equality, and familiarity. The combination of a speaker's podium and lecture style seating make people feel intimidated and formal. You want to avoid this at all costs. The following are some examples for seating arrangements. You will have to determine what is best for your group. You may want to consider changing the setup from meeting to meeting depending on the type of meeting that you are having that day.



### Closed Circle or Rectangle with Tables

#### Advantages:

- ✓ Encourages eye contact
- ✓ Encourages a sense of warmth
- ✓ Good for discussion or informal gatherings
- ✓ Heightens group mood

#### Disadvantages:

- ✗ Increased distractions
- ✗ Not conducive to problem-solving
- ✗ No single focal point
- ✗ Heightens group mood

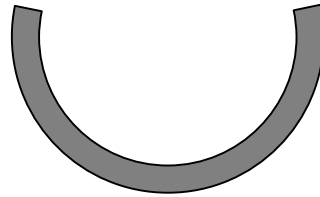
## Horseshoe or Rectangle with Tables

### Advantages:

- ✓ Allows group to focus on group memory
- ✓ Reduces status differential
- ✓ Reduces interpersonal conflict somewhat by focusing on group memory

### Disadvantages:

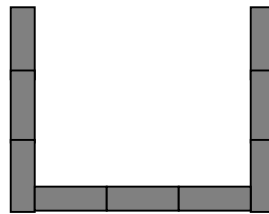
- ✗ Tables can be a barrier to building trust, flexibility, and creativity



## Horseshoe Without Tables

### Advantages:

- ✓ Promotes trust by removing barriers
- ✓ Accommodates larger groups
- ✓ Increases focus on group memory



**Disadvantages:**

- ✘ Initial discomfort for people who are used to tables
- ✘ Coffee cups and writing materials are awkward to handle

*Make a list of equipment that you might need for your next meeting. Put a check mark by those that you know how to use effectively.*

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**Equipment/Supplies**

Do you need a microphone? What about an overhead projector? Will you need a TV/VCR? Is someone setting up and testing the equipment before you start? Making sure that you know how to work specific equipment is as equally important as making sure that all of the equipment works.

**Flip Charts/Markers**

Make sure you have places to hang flip chart pages or access to wipe boards, etc. If you will be using flip charts can you use tape without damaging the walls? Ask the owner/operator of the place where you are meeting if it is permissible for you to use tape on the wall. Is there space to hang the pages where everyone can see? Is there a flip chart stand available?

Flip charts are useful in keeping ideas visible through out the meeting, so it is important to make sure that you keep them visible during the meeting. Make sure you write with markers that are non-toxic and are not dried out. When writing on flip chart paper, make sure to use dark color markers that will not bleed through to the next sheet, or skip a sheet between printed pages. Use light color markers for emphasis only.

### **Sign-In Sheet**

If people are to sign in, is there a table for them to use? Is there a pen? Sign in sheets are used to get information about the people that are attending your meeting. Having people to sign in also gives you an accurate number of how many people were at your meeting. Things to include on a sign in sheet are:

- Name
- Address
- Telephone Number
- Employer/occupation
- Email

### **Name Badges**

It is a good idea to have name badges available so that everyone can easily read the names of the people attending the meeting. Preprinted name badges that are done on the computer always look better than the ones that are handwritten. However, you have to make provisions for those people who do not RSVP in time, by providing name badges for them to write their name on. If you are unable to make name badges ahead of time, make sure that there are plenty of markers and badges for everyone attending your meeting.

### **Refreshments**

If people are hungry or thirsty it will take their minds off the meeting. If you are serving refreshments, who is the person responsible for bringing the items to your meeting? Will they be there on time? Do you need outlets for coffee pots? Can you set things up so that the people attending can get food without disrupting the meeting?

Serving refreshments is an incentive in getting people to attend your meeting. If you are having a meeting during

lunch, it is a good idea to serve a meal. Another option might be to have people bring their own lunch.

By having some type of refreshments available on site, it will help the people attending your meeting to focus on accomplishing the objectives on your agenda.

Before your meeting, make arrangements for cleanup. Having someone come in during the meeting to clean is disruptive and can take the focus away from your meeting.

### **Materials**

If you are preparing handouts for your meeting, it is important to have enough handouts for everyone there. You also want to make sure that the handouts are readable and relate to the subject matter that you are covering. It is a good idea to make extra copies for your meeting, because you might not have access to a copy machine. Having to leave your meeting to make extra copies also takes away from the meeting and can easily distract those in attendance.

Now that you have the physical aspects of your meeting taken care of there are a few other things you might want to consider to make sure all of your hard work will not go to waste:

- Post signs about the location of the meeting room
- Have a back up plan or speaker in the event your speaker or the person responsible for a certain task fails to show up
- Make sure that you or the person responsible knows the material that is to be presented
- Things that can go wrong will; arrive early to address any mishaps that may occur.

## Preparing for Presentations

Preparing for a presentation is a difficult task. There are many things that you want to consider before you make your presentation. Things that can contribute to a successful presentation range from making sure the bulb is working in the overhead to using the right color combination of markers on the flip chart. In this section, we hope to build skills as well as knowledge about effective presentations.

### Icebreakers

Icebreakers are usually done at the beginning of a meeting to get participants accustomed to sharing with each other. Icebreakers encourage group participation and give every one a chance to get to know one another. The hardest part about icebreakers is making sure everyone understands the directions.

There are different types of icebreakers. Some help when people are reluctant to share with each other. Others can get participants to “think outside the box.”

Now let’s try an icebreaker. Take a moment and fill out the sheet located behind this page. This is only one example of an icebreaker. There are several more examples located in the Tools Section of this guide (Tools 18-30).



## Simple Presentational Equipment

### Overhead Projector

Overhead projectors are used to display transparencies of information that you want everyone to see.

#### Advantages:

- ✓ Look professional, if done correctly
- ✓ Speaker can make notes on frames
- ✓ Prepare graphics on computer
- ✓ Reproduce on copier or laser printer
- ✓ Can change at the last minute
- ✓ Easy to find for questions later
- ✓ Less expensive than slides
- ✓ Lights can remain on in the room
- ✓ Do not have to turn away from audience

#### Disadvantages:

- ✗ Bulbs burn out
- ✗ Equipment is not accessible
- ✗ Need to practice to be comfortable

There are some important guidelines to remember when using overhead projectors. Make sure that you know how to change the bulb in the projector. Your credibility will be affected if you keep people waiting too long, while you search for someone to change the bulb. The audience may assume that you are not prepared and you may lose their attention.

Practice! Practice! Practice! You should practice making a smooth transition from one transparency to another. You should also practice turning the machine on and off if you have allotted for an extended amount of time in between transparencies.

*Too many words  
and sentences  
make reading  
difficult for  
participants.*

## Transparencies

There are different types of overhead projectors and some transparencies show up better on certain types of overhead projectors. There are transparencies that are laser, ink jet, copier, standard and framed.

Transparencies should be chosen to reflect the type of printer that you have or if you plan to copy your information from a plain sheet to a transparency.

On overhead transparencies, the letters should have a bold type. The font size should be large enough for the whole group to see. There should be no more than six words per line, and no more than six lines per page.

These few helpful hints about transparencies will aid in making you look professional and competent:

- Keep the audience focused on the current point by covering subsequent information with a piece of paper.
- To emphasize something, place a pencil on the transparency and leave it there.
- Do not exceed six words per line and six lines per page.
- Use graphics instead of words where possible. Use phrases instead of whole sentences.
- Use at least a 24-font size and bold type.
- Do not run a copy from a book or magazine and turn it into a transparency.

See the example of a transparency in the Tools Section of this guide (Tool 31).



## Flip Charts

Flip charts seek to ensure group memory and exhibit professionalism. If done correctly, flip charts will encourage people to participate in discussions when they see their ideas being used.

### Advantages:

- ✓ Lights are on and eye contact is easier
- ✓ Create an informal atmosphere
- ✓ Create in advance or spontaneously
- ✓ Inexpensive
- ✓ No electrical equipment
- ✓ Can add information as you speak

### Disadvantages:

- ✗ Hard to carry around
- ✗ Easily damaged
- ✗ Need to have good handwriting
- ✗ Not good for larger groups
- ✗ Cannot use elaborate graphics

*When breaking the pad beware of staples, they bite!*

There are various flip charts that can be effective in specific situations. The standard flip chart size is 27 inches wide and 34 inches long. These pads of paper are bound at the top by staples, with two holes provided for easy mounting. The use of this type of flip chart pad should begin by "breaking the pad". The self-stick flip chart is done the same way.

An important factor is whether or not the paper has a blue grid. The blue grid has several advantages:

- It allows the presenter to print in a straight horizontal line.
- It permits the margins, sub-headings, and bullets to be aligned.
- It allows a sense of symmetry and spacing to be interjected into a chart.

The cost difference between plain paper and grid paper is one dollar per pad or two cents per sheet. If the flip chart does not have a blue grid, then pre-drawn chart spacing can be accomplished by filling an entire page with lines spaced two inches apart. Next, use a black marker to draw the lines. Then, place this “cheater bleeder” underneath the chart you are drawing to use as a guide. The presenter can also pre-draw the lines on the flip chart with a blue lead pencil.

There are lots of things that go along with using a flip chart during presentations, for instance, recording ideas, markers, easels, and technique. We are going to look at all of these in hopes that this will better prepare you for using a flip chart during a presentation.

## **RECORDING IDEAS**

The recorder should be neutral. He/she captures the ideas of members on large pieces of paper in everyone’s full view. Do not edit or paraphrase; use the words of the speaker, but do not record his/her name. You may lag behind what is being said, but that is normal. If you get too far behind, ask the group to slow down until you get caught up. Each member shares the responsibility of letting you know if you have missed something important or if you wrote it down incorrectly. If group participants want to talk “off the record” or are concerned about confidentiality, they can ask you not to record a comment or discussion.

Use these pointers for recording:

- Listen for key words.
- Try to capture basic ideas.
- Do not write down every word.
- Write legibly. Print or write an inch or an inch and a half high.
- Do not be afraid to misspell words.
- Abbreviate words.
- Circle key ideas, statements, or decisions.
- Vary colors: use colors to highlight and divide ideas.
- Underline.
- Use stars, arrows, numbers, etc.
- Number all the sheets.

Look for the suggested introduction of a recorder and tips to use in the Tools Section of this guide (Tools 32-34).



## **EASELS**

Easels are the most powerful tool for assisting in meetings or trainings; however, easels can be difficult to manage. There are different variations of easels; you should choose the one that best fits your needs. Easels should have a back plate that extends under the entire pad, they should be braced for stability and all of the easels should be of the same height and angle. The easel should hold at least one full pad of paper (approximately 50-60 sheets). Easels that clamp the paper in place should be avoided. It is very difficult for one person to mount or remove paper from an easel with a clamp. An easel with a marker tray is optional, but it is nice to have a place to hold markers, pencils, correction tape, etc.

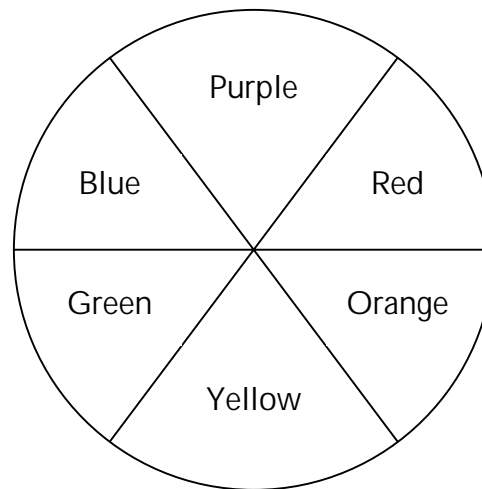
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**MARKERS**

A major asset in presentations is the writing tool itself. There are two types of magic markers: watercolor and permanent. There are various brands available for both types of markers. The most popular brands are *El Marko*, *Papermate*, or *Mr. Sketch*. Choose markers with a flat tip if possible. For most presentations, graphics and recording, watercolors are highly recommended because they do not bleed through to the next page and they wash out of clothes.

*Using the color wheel, find your favorite color and write down its compliment color.*

Colors express feelings. Studies show that people of all ages and all parts of the world have similar reactions to color. Use the color wheel below to find out what colors compliment each other. Complimentary colors are directly across from a selected color. The "Complimentary family" are those colors left and right of a color.



## TECHNIQUES

Drawing boxes, borders, and underlines on a large display involves using one's whole body to draw. Draw top to bottom lines by dropping straight down. The recorder should practice by drawing horizontal lines by moving his/her whole body without bouncing. Draw circles using the shoulder as a compass pivot.

Good lettering involves consistency, which refers to the style of printing used on a flip chart. Never use script on charts since it is too hard to read. Printed letters are easier and faster to write when recording. Use lowercase letters, for the best legibility. Using capital letters only where normally required. Short headlines may be written in all capitals, but phrases having more than three words and full sentences should follow the rule of lowercase lettering.

Good lettering also involves size. Size refers to the height of the letter in relationship to the distance from the audience. A common rule of thumb is to make the lowercase letters one half inch high for every ten feet of viewer distance. One-and-one half inches is a good size to use if unsure of the room configuration or the distance to the audience.

Space is also involved in good lettering. "Space" refers to the distance between the letters of individual words. The spacing must be judged by experience rather than on a mechanical basis. One should avoid spacing letters at regular intervals since this creates uneven patterns of white

space around letters. The only way to overcome this potentially distracting unevenness is to space all of the letters by "optical spacing," that is, by what appears even to the eye. Vertical spacing between lines is also important for legibility. Lines that are too close together

tend to blur at a distance. If the letters are too far apart, they will seem disjointed. Separate baselines by one-and-one half times the height of the letters to overcome these problems.

Position is a component of good lettering. Position is one's body and where one stands in relation to the easel. The best place to stand is directly in front of the easel with one's body centered over the left half of the chart if he/she is right handed, vice versa if he/she is left-handed. The primary reason is that printing wanders, usually down. It is the limited span (the arc) of your arm. If one stands to the side, he/she cannot reach the furthest area of the pad. If one is printing on the bottom of the chart, he/she might consider kneeling down in front of the chart or tipping the entire easel away from the body.

### **OTHER**

Masking tape is best to tape the paper to the wall. Place small strips of tape approximately two inches along the sides of the easel. This will allow the recorder quick and easy access to tape when they are ready to hang charts.

Self-adhesive correction tape is used for correcting mistakes on flip charts. There are different types of tape available on the market. The most inexpensive type of "correction tape" is the standard-size pressure-sensitive mailing label. These typically come twelve labels per sheet. The recorder is advised to tape over the mistake and then print the correction. Participants will not be able to tell the difference.

A few more tools that might be handy in the presenter's toolbox are a yardstick, pocketknife and a hole punch. A yardstick will help with drawing straight lines on pre-made charts. A pocketknife will help to straighten staples when "breaking" the flip chart pad. To make holes in flip charts to hang on the easel you will need a hole punch.

**Guidelines for use:**

- Make drawings simple and bold
- Use large letters and print
- For drawing, use big, heavy lines
- Sketch in pencil in advance if you prefer
- For easy reading, alternate colors between points
- Use every other sheet to prevent one from showing through the next
- Stand to the left of the chart
- Turn to a blank page when the visual on the flip chart is not relevant to what you are discussing.

More guidelines can be found in the Tools Section of this guide, Tool 34.



*"A good facilitator ensures that members feel empowered about their own ideas and participation, stay invested in your organization, and take on responsibility and ownership for decisions."*

## Facilitating Coalitions

Many groups overlook the importance of having someone facilitate meetings. They do not realize that they need someone to shape and guide meetings (big or small) so that they meet their goals and accomplish what they've set out to do. While the entire group might set the agenda and figure out the goals, one person needs to concentrate on how you are going to move through your agenda and meet those goals effectively. This person is called the "facilitator". The facilitator:

- Is a guide to help people move through a process together, not the seat of wisdom and knowledge. That means a facilitator isn't there to give opinions, but to draw out opinions and ideas of the group members.
- Focuses on HOW people participate in the process of learning or planning, not just on WHAT gets achieved.
- Is neutral and never takes sides.

### Can anyone facilitate a meeting?

Being a good facilitator is both a skill and an art. It is a skill in that people can learn certain techniques and can improve their ability with practice. It is an art in that some people just have more of a knack for it than others. Your group may have a person with experience or natural ability in this area already or you may have someone who could develop these skills.

### Can the chairperson be the facilitator?

A good chairman can be the facilitator. While they have to get through an agenda and make sure that important issues are discussed, decisions made, and actions taken, good chairs do not feel that they have all of the answers or should talk all the time. So the answer is, "it depends". In some cases the chairman can facilitate

while in others it is better if they do not. When trying to decide, consider if the chairperson realizes the importance of hearing what the participants in the meeting have to say. Can the chairperson focus on how the meeting is structured and conducted to make sure that everyone can participate? They would need to be able to do things like:

- Make sure everyone feels comfortable participating
- Develop a structure that allows for everyone's ideas to be heard
- Make members feel good about their contribution to the meeting
- Make sure the group feels that the ideas and decisions are theirs, not just the leader's
- Support everyone's ideas and never criticize anyone for what they have said

### **Key Tasks of Facilitators**

- Encourages shared input and nurtures dialogue among participants to create a learning atmosphere
- Manages racial, cultural and class differences and the attendant conflict that emerges in the process of dealing with these differences
- Helps maintain continuity between meetings by identifying work tasks for participants, and keeping them well-informed about the work of the coalition
- Assists the group in learning and applying consensus decision-making techniques (win-win) rather than "win-lose" methods
- Manages the setting of an agenda for meetings of the coalition
- Creates opportunities for celebration

### **Getting Ready for the Meeting**

Here are a few reminders that were mentioned in the “Preparing for Successful Meetings” section of this guide. How people sit, whether they can hear, whether they are hungry or tired can make or break your planning process. As a facilitator, the logistics of the meeting should be of great concern to you, whether you are responsible for them or not. Some things to consider are:

- **Chair Arrangements**

Having chairs in a circle or around a table encourages discussion, equality, and familiarity. Speaker’s podiums and lecture style seating make people feel intimidated and formal. You want to avoid this at all costs.

- **Flip Charts**

Make sure you have places to hang flip chart pages or access to wipe boards, etc. If you will be using flip charts can you use tape without damaging the walls? Are there walls to hang the pages where everyone can see, etc? Is there a flip chart stand available? Is there enough space so that you can keep important material visible instead of removing it?

- **Sign-In Sheet**

If people are to sign in – is there a table for them to use? Is there a pen?

- **Refreshments**

If people are hungry or thirsty it will take their minds off the meeting. If you’re having refreshments, who is bringing them? Do you need outlets for coffeepots? Can you set things up so folks can get food without disrupting the meeting? Who’s cleaning up afterwards?

- **Equipment**

Do you need a microphone? An overhead projector?  
Is someone setting up and testing the equipment  
before you start?

### Ground Rules

Successful collaboration requires that everyone in the group contributes to and develops a stake in the process. Ground rules can ensure that partners use time wisely, share leadership, and head in the same direction. These rules should cover maintaining communication among partners, operating the collaboration on a day-to-day basis, resolving organizational and personal conflict issues, and planning and conducting meetings. Sometimes determining ground rules is the first decision the group makes together.

*Too many ground rules weaken rather than strengthen the group process.*

Ground rules:

- Help members to behave in ways that are accepted by others
- Define the behaviors that are not acceptable to the group
- Show how to deal with disagreement in a positive way

Too many ground rules weaken rather than strengthen the group process. Here are a few issues that can guide groups in determining ground rules.

- Where, when, and how often to meet?
- How will they share responsibility for organizing and leading the meetings?
- Who prepares and contributes to the agenda?

Use the next page to develop your ground rules. More ideas on Ground Rules can be found in the Tools Section of this guide, Tool 35-37.



## During the Meeting

- **Start the meeting on time.**

If you do not the people who rushed to get there on time feel cheated. Start no more than five minutes late and thank everyone who came on time. When latecomers straggle in, do not stop your process to acknowledge them. Wait until after a break or another appropriate time to have them introduce themselves if they need to. By the same token, do not make them feel awful for being late.

- **Welcome everyone.**

Make a point to welcome everyone who attends. Do not complain about the size of a group if the attendant turnout is small! Nothing will turn the folks off who did come faster. Thank all of those who are there for coming and analyze the turnout attendance later. Go with the members you have.

- **Make introductions.**

There are many ways for people to introduce themselves to each other. The kind of introductions you do should depend on what kind of meeting you are having, the number of people, the overall goals of the meeting, and what kind of information it would be useful to know.

- ✓ If it is an organizational meeting, you might ask them to tell what they hope the group can accomplish.
- ✓ If the meeting is called to focus on a particular problem, you might ask "What makes you most angry about this problem?"

*You can find ideas for icebreakers in the Preparing for Successful Meetings and in the Tools Section in this guide, Tools 18-30.*



- ✓ Use an “ice breaker” as an introduction. Icebreakers can:
  - ◆ Break down feeling of unfamiliarity and shyness
  - ◆ Help people shift roles – from their “work” selves to their “more human” selves
  - ◆ Build a sense of being part of a team
  - ◆ Create networking opportunities
  - ◆ Help share participants’ skills and experiences
  
- ✓ Every one needs to participate in the activity. The only exception may be latecomers who arrive after the introductions are completed. At the first possible moment, ask the latecomers to say their name and any other information you feel they need to share in order for everyone to feel comfortable and equal.
  
- ✓ Be sensitive to the culture, age, gender and literacy levels of participants and any other factors when deciding how to do introductions. For example, an activity that requires physical contact or reading a lengthy instruction sheet may be inappropriate for your group. Also, keep in mind what you want to accomplish with the activity. Don’t make a decision to do something only because it seems like fun.
  
- ✓ It is important to make everyone feel welcome and listened to at the beginning of the meeting. Otherwise, participants may feel uncomfortable and unappreciated and won’t participate well later on. Also, if you don’t get some basic information

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about who is there, you may miss some golden opportunities. For example, the editor of the regional newspaper may be in the room; but if you don't know, you'll miss the opportunity for a potential interview or special coverage.

*In the Tools Section of this guide you will find a dialogue to help you introduce your role as facilitator to the group, Tool 38.*



- ✓ And don't forget to introduce yourself. You want to make sure that you establish some credibility to facilitating the meeting and that folks know a bit about you. Credibility doesn't mean you have a college degree and 15 years of facilitation experience. It just means that you share some of your background so folks know why you are doing the facilitation.
- ✓ Go over what's going to happen in the meeting. Check with the group to make sure they agree with and like the agenda. You never know if someone will want to comment and suggest something different. This builds a sense of ownership of the meeting and lets people know early on that you're there to facilitate THEIR process and THEIR meeting, not your own agenda. The same is true for the outcomes of the meeting. You'll want to go over these with the chairman to check that these are the desired outcomes they are looking for. Find out if they have ground rules that they have already set.

- **Encourage participation.**

This is one of your main jobs as a facilitator. It is up to you to get those who need to listen, to listen, and those who ought to speak, to speak.

Encourage people to share their experiences and ideas and urge those with relevant background information to share it at appropriate times.

It is important to expand your thinking to include “all” of the dimensions of a problem or solution. Brainstorming is a tool that can be used to help a group generate as many ideas as possible in as short a time as possible.

Brainstorming can be used in two ways.

- ✓ **Structured:** In this method every person in a group must give an idea as their turn arises in the rotation or pass until the next round. It often forces even shy people to participate but can also create a certain amount of pressure to contribute. Another benefit is it keeps the more vocal and outspoken members in check and keeps them from over-running the group.
- ✓ **Unstructured:** In this method, group members simply give ideas as they come to mind. It tends to create a more relaxed atmosphere but also risks domination by the most vocal members. It is important to capture the ideas as quickly as possible; slowing the group down to capture ideas drops the creativity and synergy of the group. Always set a time limit, and do not force the group to keep going if they have exhausted their input. They are done!

*See more ideas on Brainstorming and activities to help with brainstorming in the Tools Section of this guide, Tool 39-43.*



Probing is one technique that works well when you are trying to create a collaborative climate to discuss problems and options (the coalition will have a number of these discussions). A good facilitator can use this technique to involve everyone. See the Tools Section for details on how to use probing, Tool 44.



- **Stick to the agenda.**  
Groups have a tendency to wander far from the original agenda, sometimes without knowing it. When you hear the discussion wandering off, bring it to the group's attention. You can say, "That is an interesting issue, but perhaps we should get back to the original discussion." You can find more information on agendas in the Preparing for Successful Meetings section of this guide.
- **Avoid unimportant detailed decision-making.**  
Sometimes, it is easier for groups to discuss the color of napkins than the real issues they are facing. Help the group keep from getting immersed in details. Use the following information on Consensus decision-making to help you keep the discussion on track.

## Consensus Decision Making

What it is:

- A process that gives all team members a chance to be heard.
- A process that allows individuals to discuss the pros and cons of several different options before selecting one.
- A process in which a team tries to find solutions to problems that meet the needs or concerns of all team members and are acceptable to all.
- A process that opts for commitment of the team members over the speed of decision-making.

What it is not:

- A time to focus on the merits of your solution to the exclusion of others.
- A process in which everyone must or even will be satisfied with the final decision.
- A process that relies on voting to reach a decision.
- A process that encourages competition among team members.
- A process for quickly reaching a decision.

**Guidelines for consensus:**

- Allow time for all team members to voice their opinions.
- State your position clearly.
- Openly and actively listen to what others have to say. Suspend judgment.
- Do not avoid conflict. Use opposing views as a stimulus for further discussion.
- Restate the views of those with whom you disagree to make certain you heard them correctly.
- Work toward decisions that all team members are willing to accept and support. This may mean integrating various viewpoints into a creative solution or piloting an alternative.

See the tool for dealing with disrupters in the Tools Section of this guide, Tool 45.



- **Seek commitments.**

Getting commitments for future involvement is often a meeting goal. You want leaders to commit to certain tasks, people to volunteer to help on a campaign or organizations to support your group. Make sure adequate time is allocated for seeking commitment. For small meetings, write people's names down on a flip chart next to the tasks that they agreed to undertake. If at all possible you do not want to leave a meeting by saying "We will get back to you to confirm how you might like to get involved." Seize the moment! Sign them up!

- **Bring closure to each item.**

Many groups will discuss things ten times longer than they need to unless a facilitator helps them to recognize they are basically in agreement. Summarize a consensus position, or ask someone in the group to summarize the points of agreement, and then move forward. If one or two people disagree, state the situation as clearly as you can: "Tom and Sandra seem to have other feelings on this matter, but everyone else seems to be in agreement. Perhaps we can decide to go in this direction that most of the group wants, and Tom and Sandra can get back to us on other ways to accommodate their concerns. See more on maintaining group focus in the Tools Section of this guide, Tool 46.



- **Respect everyone's rights.**

The facilitator protects the shy and quiet folks in a meeting and encourages them to speak out. There is also the important job of keeping domineering people from monopolizing the meeting or ridiculing the ideas of others.

Sometimes, people dominate a discussion because they are really passionate about an issue and have lots of things to say. One way to channel their interest is to suggest that they consider serving on a committee or task force on that issue. Other people, however, talk to hear themselves talk.

- **Changing the Agenda.**

Sometimes issues will arise in the meeting that are so important, they will take much more time than you thought. Sometimes, nobody will have thought of them at all. You may run over time or have to alter your agenda to discuss them. Be sure to check with the group about whether this is ok before going ahead with the revised agenda. If necessary, ask for a five-minute break to confer with key leaders or participants on how to handle the issue and how to restructure the agenda. Be prepared to recommend an alternate agenda, dropping some items if necessary.

- **Summarize the meeting results and needed follow-ups.**

Before ending the meeting, summarize the key decisions that were made and what else happened. Be sure also to summarize the follow-up actions that were agreed to and need to take place. Remind folks how much good work was done and how effective the meeting hopefully was.

Refer back to the objectives or outcomes to show how much you accomplished.

- **Thank the participants.**

Take a minute to thank people who prepared things for the meeting, set up the room, brought refreshments, or did any work towards making the meeting happen. Thank all of the participants for their input and energy and for making the meeting a success.

- **Close the meeting.**

People appreciate nothing more than a meeting that ends on time. It's usually a good idea to have some "closure" in a meeting, especially if it was long, if there were any sticky situations that caused tension, or people worked especially hard to come to decisions or make plans. One way to do this is to go around the room and have people say one word that describes how they are feeling now that all of this work has been done. You'll usually get answers from "exhausted" to "energized!" If it's been a good meeting, even the "exhausted" ones will stick around before leaving.

See the Tools Section for more ideas on facilitating groups, Tools 47-48.



