

Community Heart & Soul™

— Guided by what matters most —

RESOURCE



Outreach and Communications

How to Spread the Heart & Soul Word

For Heart & Soul Process Phase



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WHAT WE BELIEVE

The Orton Family Foundation's mission is to empower people to shape the future of their communities by improving local decision-making, creating a shared sense of belonging, and ultimately strengthening the social, cultural, and economic vibrancy of each place.

We do this by assisting the residents of small cities and towns in the use of the Heart & Soul method, a barn-raising approach to community planning and development designed to increase participation in local decision making and empower residents to shape the future of their communities in a way that upholds the unique character of each place.

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Introduction

Effective communication is an essential element of any Community Heart & Soul™ project. Communications should strive to get the word out about your project to a broad cross-section of the community—newcomers and old timers, youth and retirees—and everyone in between. Keeping the flow of information about the project and activities open, accessible, and transparent is key, too, because that builds trust.

Ultimately, the more people you reach in a way that reflects your town's demographics and the more open your communication, the better results you'll get. And Heart & Soul will do what it sets out to do: Involve Everyone, Focus on What Matters, and Play the Long Game.

This guide will walk you through the steps necessary to create a Communications Plan including:

- Selecting a Communications Committee
- Establishing Communications Goals
- Developing Core Messaging and Branding
- Identifying Audiences
- Assessing Media and Other Communication Channels
- Preparing Pre-launch Materials
- Preparing a Budget
- Creating a Communications Action Plan
- Tracking Performance

Set the Stage

Select a Communications Committee

Establishing a Communications Committee, as a subcommittee of the Heart & Soul Team, is strongly recommended. This committee is responsible for conceptualizing and carrying out a Communications Plan and creating content to promote the Heart & Soul effort. The Communications Plan should include traditional media, social media, and other communications that reach all demographics in your town. Typically this committee is made up of volunteers, though sometimes individuals with specialized skills are paid. Here are suggested duties/assignments to fulfill on the Communications Committee:

- Lead spokesperson for the project
- Additional contact person(s), to help field media inquiries
- Website manager
- Social media manager
- Transparency officer to ensure all project documents are accessible
- Graphic artist
- Photographer
- Videographer

TIP: For photography and videography help, check with your local public access TV station or high school or college digital media program.

Prepare a Communications Plan

A Communications Plan is your roadmap for effectively getting information to people. As with so many aspects of Heart & Soul, a strong Communications Plan dovetails with your project's [Community Network Analysis](#).

Community Network Analysis is important in this context because it identifies audiences and demographics, and helps map out communication channels to reach them. So, a Communications Plan builds from the CNA and spells out the best ways to reach people with a strategy for when and how often.

Key elements of a Communications Plan:

- **Messages:** create messages that clearly communicate project goals
- **Audiences:** reach everyone using Community Network Analysis as a guide
- **Communication channels:** find the best outlets (newspaper, radio, social media, phone calls) to get your message to each audience
- **Messengers:** key people to help ensure the message is well received using Community Network Analysis as a guide
- **When:** create a calendar of Heart & Soul and other events so you can plan and prepare
- **Measurement:** to gauge success and make adjustments; for example, by noting attendance, survey responses, social media engagement

See [Communications Plan Basics](#) for a handy checklist of key elements.

Steps to take to create a Communications Plan:

1. Establish Communications Goals

An overarching goal of every Community Heart & Soul initiative is to give diverse people many opportunities to participate. (See our [Many Perspectives from Diverse Voices](#) tool)

Goals of a Communications Plan include:

- Ensure public understands goals of the Heart & Soul project

- Conduct effective community outreach to increase public participation in Heart & Soul activities
- Prioritize transparency in reporting Heart & Soul meeting minutes, activities, findings

2. Develop Core Messages and Branding

2.1 Messaging and Branding

Early on in Phase 1 of your project, the Heart & Soul Team may have developed a short, clear message that tells people what your project is about. All members of the Team should be on the same page with the message. While the delivery may change based on the audience, the essential message about what the project is and its goals should be consistent.

This short description of the “who, what, and why” of your Heart & Soul initiative is what we call a checkout-line speech. Sometimes called an “elevator speech,” we call it a checkout-line speech, because in many small towns, standing in line at a checkout counter is a more typical everyday experience than riding elevators! The message needs to be short enough to deliver in a couple of minutes, or the time one might be standing in a grocery store checkout line. The checkout-line speech is an important tool for taking a consistent message to the community (see our [Checkout-line Speech Examples](#)).

The Communications Committee builds from that core checkout-line speech when creating messaging about the project. This avoids confusion and presents a strong, clear voice to the community, which builds confidence and trust. Other types of messaging include press releases, posters, social media posts, and letters to the editor.

Tips on what makes a good message:

- Use local voices to help explain the reason and purpose for Heart & Soul
- Tailor the message so it resonates with audience (word choice, images, medium, spokesperson, language)
- Focus on benefits and results of Heart & Soul; avoid diving into the process

Creating Your Checkout-Line Speech

Early in Phase 1, the Heart & Soul Team typically crafts a clear, concise way to explain the project. This can be a job for the Communications Committee, or the Team may do this before the committee is formed. In any case, the Heart & Soul Team needs to be on board with the message for it to be effective.

Key elements include:

What is Community Heart & Soul?

Why Heart & Soul here and now?

Make it personal:

What's your involvement?

Goal or benefit:

What do you believe it will do for your community?

Call to action:

Something listeners can DO to get involved (sign up for your e-newsletter, volunteer, attend an event).

Here's a sample:

About 100-150 words (30-60 seconds)

We believe that there's a better, more inclusive way to meet the challenges of our times and enhance the place we love. Through Community Heart & Soul, we are striving to do things differently. We want to engage the community in conversations about what makes us unique and what matters most about our hometown. We encourage engagement of more than the same handful of people who show up at "official" meetings. As we work toward a shared vision for our community based on what a broad spectrum of people are saying and doing, we will become a stronger, more closely knit community. Come to our launch party next week at the high school! (113 words)

See our [Checkout-line Speech Examples](#) for more ideas to get you started.

To practice delivering your message to different audiences, try this exercise:

Have each Heart & Soul Team member jot down a person or audience that the project aims to reach. For example, teenager, new resident, business owner, the Rotary Club, young working parent. Toss the names in a hat and have each person pick one.

Next, have participants deliver the checkout-line speech in a way that's tailored to the audience on the piece of paper. This is a simple, but effective way to start to consider and practice the best ways to message different groups in your community.

Consistency in how you treat people, how volunteers and others talk about the project, how your events are run and how you follow up lead to credibility and a good reputation. See our [Branding Brainstorm Tips](#) for ideas about how best to brand your Community Heart & Soul project.

Choosing a logo and creating a consistent look and feel for your project is an important part of the branding process, too. Many towns have invited the community to help design and choose a logo. Some have involved local artists in the effort.

Sample project logos



In addition, we offer a number of ready-made graphic ideas you can use. Our [Graphic Design Tips](#) offer pointers on graphic design to show volunteers the importance of getting it right; a graphic designer in your town will have this and much more at his/her fingertips.

For guidance on use of the Community Heart & Soul logo, please refer to [Brand Identity Guidelines](#). Our [Project Logo Templates](#) includes design files and fonts to help get started.



3. Create an Online Presence

3.1 Website

A website can be a hub for community members, partners, media, and others to learn about and track your project, including upcoming events and milestones, successes, and stories about local people. Websites are also a great place to keep event photos. There are many user friendly, website building options to choose from that provide templates and allow you to customize with logos and images. Some Heart & Soul projects have found a home on other sites like the town's website or a downtown organization's site.

A blog on your website can also give you a platform for engaging the community. You can keep people up to date with what's happening. Visitors to the blog can comment on posts (with moderation from the site administrator). Your Communications Committee's transparency officer can be responsible for making sure the site is updated in a timely manner with the necessary documents, like dates and locations of meetings and agendas and minutes.

3.2 Social Media

Social media is another effective way to reach residents and spread the word about events and results. With so many options, (Facebook, Instagram, Snapchat, etc.) the social media landscape can seem daunting. Rely on your social media manager to help gauge which types of social media might be most effective in your area.

3.3 Email Blasts

Sending out emails—newsletters, updates, event invites—to targeted audiences is a great way to get the word out about Heart & Soul happenings and results. While this can be done from your project's email address, there are many online services that let you customize, schedule, and analyze the response to your e-campaigns.

Gathering e-mail addresses can be done in a number of ways. Your website can include an e-newsletter sign up. You can ask people to sign up at events. You can ask recipients to forward your emails on to their friends.

In general, know your community well enough to judge how effective e-communications will be; there are still rural areas where web connectivity is spotty or even nonexistent. Use our [Prioritize Communications Channels](#) table and rely on your Community Network Analysis to help you identify which communication channels reach which people in your town. See our [Website and Social Media Tips](#) for more advice.

4. Prepare for Communications Activities

4.1 Identify audiences

Once again, use your Community Network Analysis as your compass to point you to the people and places you will want to be sure to reach in your communications efforts. The CNA captures the “general public” and also specifies audiences that are not reached by broad messaging.

Reaching out to apparently disengaged residents and missing voices, which could include youth or minorities, is a fundamental part of any Community Heart & Soul project.

Target audience groups might be:

- Homeowners
- Renters
- Business owners
- Volunteer and civic organizations
- Students
- Young working parents
- Retirees/seniors
- Residents with low income
- Racial or ethnic minorities

Check out [Many Perspectives from Diverse Voices](#) for a more complete list to consider.

Inventory and assess media and other information channels

Create a spreadsheet inventory of media outlets that cover your Heart & Soul project area. Examine your Community Network Analysis and make sure you can reach all of the audiences identified there.

It is helpful to think in terms of four general categories and consider using all to reach a diversity of residents.

- **Traditional media** including newspapers, radio, and television
- **Targeted-reach** communication like organization newsletters, online community forums, community bulletin boards, community events, gathering places
- **Project-specific** communication such as your website, Facebook page, and project posters
- **Face-to-face** communication at block parties, neighborhood meetings, or local gathering places like the coffee shop or laundromat

Identify the key people to connect with at various channels, such as the webmaster, newsletter editor, or the reporter who covers community news. As you assemble a media inventory spreadsheet, include email addresses, for sending out announcements and press releases.

When surveying the media landscape, be aware of the opportunities and challenges in the community. For example, if there is no local newspaper, is there a regional publication that regularly covers news in your town? If not, consider additional ways to spread the word, like posters, email, or Facebook. Is there someone on the Heart & Soul Team who knows a reporter or editor and can build a bridge to the local paper? Great! If not, schedule a meeting with the newspaper editor to introduce the project.

For a deeper dive into assessing the media landscape, use our [SWOO Analysis worksheet](#).

For tips, see our [Working with the Media](#) tool.

Be sure to differentiate between communication methods that will reach **most** people versus methods that will reach **different** people. Since one goal is to engage new voices, make a targeted effort to reach those individuals. Ask:

- Who will be the easiest to reach and how will we reach them?
- Who will be the most difficult to reach and how will we reach them?

Consider these questions in evaluating which channel is best for different audiences:

- **How do most people in your community get information?** If lots of people stop at the coffee shop in the morning, consider placing a poster there. If your community isn't particularly Internet-connected, place messages in other media. Your Community Network Analysis can guide you here.
- **Consider creative ways to reach your audiences.** If you are trying to reach parents, ask to make an announcement at a PTA event, or ask the school to include a flyer to go home with kids. Trying to reach teenagers? Find them at school or where they hang out virtually on social media.

- **People can be channels.** Every community has a few people who can provide invaluable access to hard-to-reach residents. You'll see them highlighted on your CNA as "network connectors." They can help get the word out to everyone.

And use our [Prioritize Communications Channels](#) table to determine which media channels will reach the greatest numbers of desired audiences.

4.2 Coordinate efforts with project timelines

For each event, milestone, and activity that you want to publicize, create a plan.

- Begin with the Heart & Soul Work Plan schedule to see places that dovetail with the project.
- Look for existing events to piggyback on (community events, fairs, festivals).
- Choose best channels to alert residents, media, and designated or hard-to-reach groups.
- Choose the messenger who best fits each group.
- Include deadlines for communication materials and leave time for review/approval by the Heart & Soul Team.
- Clarify your goals, and build a tracking system that spells out how to attain them. See the sample below or download the [Communications Goals Follow-Through](#) tool.
- Observe who attends or ask how people heard about your event.
- Gather attendee email addresses to add to newsletter and other mailing lists.

TIP: Evaluating how attendees hear about your events can yield surprising results. One Heart & Soul Team used postcards to let neighbors know about events. Creating and mailing postcards was time-consuming and costly, so they planned to stop using them. But, after surveying attendees, the Team found postcards were the way most people heard about events.

Communications Goals Follow-Through Sample

TACTIC/ CHANNEL	PURPOSE	PRIORITY AUDIENCE	MESSENGER	BUDGET	TIMING/ PHASE	RESPONSIBLE
GOAL: Ensure public understands the goals of the Heart & Soul project						
Letter to the editor	Build general awareness of storytelling work	Residents who read paper	Elected official, Business owner	Volunteer time	Monthly/Phase 2 storytelling	Comm. Committee member
Website or Facebook	Keep people informed about project		Project staff	Web designer pay, Facebook ads/post boosting	On-going	Social media manager/website manager
GOAL: Conduct effective community outreach to increase participation in Heart & Soul activities						
July festival	Gather stories, inform, encourage long-term involvement	Artists, young families	Project staff	Volunteer time	July 22	Project staff

5. Prepare a Communications Budget

Good communication isn't expensive, but it does require some funding for materials, assistance, and advertising. Consider personnel and financial resources for each action developed. What can volunteers do? What might be donated? See our [Sample Communications Budget](#).

6. Track Performance

- Choose measurement methods such as number of news stories, social media reach and engagement, attendance numbers. Set realistic targets.
- Identify effectiveness of paid advertising (digital ad click-through rate, "how did you hear about our event" survey responses).
- Archive all press articles, letters to the editor, media interviews.
- Develop process for mid-course corrections based on evaluation results. ([Prioritize Communications Channels](#))

TIP: Be open to trying new tactics if measurement results show you are missing a group. One Heart & Soul Team found they were not reaching 20- to 30-year-olds, so they used flyers and drink coasters at the local pub to get the message out.

Event feedback

The best way to evaluate your outreach efforts is to use a feedback form at events. Keypad polling is another effective way to do this. See our [Using Keypad Polling](#) resource.

Here are some sample survey questions:

- How did you hear about this event?
- In which neighborhood do you live?
- How old are you?
- How long have you lived here?
- How would you describe your level of involvement with this project so far? (Response options: A lot, some, or I'm a first-timer)
- What is your race/ethnicity?
- What is your household income range? (with checkboxes for different ranges)

Asking these questions consistently will help reveal which audiences you are reaching through each channel, and to assess whether you are meeting the goal of broad community engagement. Use our [Participant Survey Form](#) to get started.

The true measure of success lies in combining the responses to these key questions. Let's say you host an event, and you learn that 70 percent of the people who attended heard about the event from a poster at the coffee shop, and they are all ages 50-65, live in a certain neighborhood, are long-time residents and have been involved in the project so far. That tells us that you've got a committed group of people representing a reasonably similar viewpoint. Every community effort needs this core of committed people.

If, however, you learn that 20 percent of people heard about the event from a sign at the entrances to the mobile home parks, and your age groups, neighborhoods and level of involvement are more varied, you know that you're on the right track!

Prepare Pre-launch materials

Having the materials ready that explain your project helps get things off to a strong start, whether you are recruiting volunteers or talking to a reporter. Here's a list of suggested materials to have ahead of the official project launch:

- FAQs (frequently asked questions) with concise answers (see [FAQ Samples](#))
- Talking Points for Team Members and volunteers (see [Talking Points Samples](#))
- Charts that show the project timeline and goals (see [Milestones Worksheet](#) and [Milestones Poster](#))
- Templates for newsletters, presentations, flyers, and posters (see [Graphic Design Tips](#))
- Presentations to provide project information and updates to clubs, committees, elected officials, and others
- Introductory videos

7. Putting it All Together

7.1 Integrate communications efforts with overall project timeline

Once you have tended to the details of creating messaging, identifying audiences and media outlets, it's time to get down to making it happen. Check our [Communications Plan Basics](#) to see what elements you might be missing. Use our [Communications Goals Follow-Through](#) worksheet to help stay organized.

It's helpful to create a matrix that allows you to chart the nuts and bolts of sending your messages out the door. Here's a suggestion for how to organize your Communications Action Plan:

AUDIENCE	MESSAGE	CHANNEL	CONTACT PERSON	PRODUCTION PERSON	CHANNEL DEADLINE	COST OF PRODUCTION	EVALUATION METRIC

To develop the plan, ask yourself:

- Who is responsible for producing the content for each communications channel?
- What is the timeframe for production to make sure the content gets to the channel on time?
- How will you use each channel (e.g. for all event announcements, for project updates, for soliciting feedback)?
- Who is the contact person for each channel?
- How much does it cost to produce the content for each channel?

It is imperative to keep your overall goal in mind and evaluate which combination of channels generates the broadest (or deepest) level of community engagement.

More Communications Resources

[FAQ Samples](#)

Frequently Asked Question samples to help you tailor FAQs to your Community Heart & Soul project

[H&S Talking Points Sample](#)

Talking points samples that will help your team write informative, helpful messages so residents will understand all about your Heart & Soul efforts.

The OpEd Project: [Tips for Op-Ed Writing](#)

OpEd is short for opposite the editorial page in a newspaper and refers to opinion pieces usually written by people who are not on the newspaper's staff.

[Cause Communications Toolkit](#)

The Cause Communications Toolkit includes all you need to know to spread the word about Community Heart & Soul. This free 134-page illustrated guide will help you find the best approaches, messages, and vehicles for reaching all of your key audiences. It is not meant to be a textbook or definitive source on any one topic, but rather an overview of what you, as a community leader and volunteer, need to know to navigate your way through myriad communications efforts—from branding your organization and developing your communications plan to choosing the right approaches and measuring results.



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