

**Marketing tool kit**

* **Some basic tools to help with day to day marketing**

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Hello.

No matter how big or small your organisation; whether it’s a big charity or a small community group run purely by volunteers, it’s important that you let the people that you want to reach know that you are there, why you’re there and how you help.

In a nutshell, that’s what marketing is. End of.

In recent years, as competition for funding and support has increased, marketing has also come to mean demonstrating your impact, providing evidence of how you change lives and proving that you are the ‘go to’ organisation for the people who need you.

It’s a sad fact that many not-for-profit organisations can’t afford to invest in a marketing team, or officer, to help them raise awareness about their organisation, and reach more people.

However, even the smallest of you can promote your organisation – by talking about it consistently, promoting it to the people you want to help and asking for their feedback.

This tool kit is not the complete solution to marketing (there are lots of courses and guides out there) but it offers some basic templates and guidance to help you on your way.

Don’t feel you have to use it all at once, it’s there for those days when you want to do something and, perhaps, don’t know where to start.

We hope you find it useful.

About Marketing

The official academic definition of marketing, from **The Chartered Institute of Marketing** (CIM), is:-

**"Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably."**

For the not-for-profit sector this means: -

* identifying a particular **need** (or needs) and meeting it through charitable services and support
* Raising awareness of a particular issue (or issues) and engaging a wide range of stakeholders in tackling it
* Promoting a specific cause in order to gain support, raise awareness, campaign for change and raise funds.

There are a number of processes involved in marketing your organisation efficiently, which the Chartered Institute of Marketing divides into seven, important groups, known as the ‘Seven Ps’:- Product; Price; Promotion; Place; People; Process; Physical Evidence

**You can read about them in the document; Marketing *and the 7 Ps*, contained in Appendix 1 of this tool kit.**

If you’re short on resources and time pressured the basics of marketing for your organisation should not really fall below the following: -

Product – your vision, mission and values; offer (elevator pitch) and messages; the key services you deliver.

Price – a clear rationale for why your services are free (if they are) with evidence of the value that they represent to beneficiaries; a competitive price for paid for services, based on market conditions

Promotion – a strong website; a printed summary of your services and how to access them; print and social media communications to raise awareness and promote initiatives where appropriate; publication of your website address and telephone number at every relevant opportunity

Place – clear entry points to services with directions on how to access them

People – staff/volunteers who are on message and talk consistently about your organisation; ambassadors and spokespeople who can raise awareness; case studies and personal stories to bring your work alive

Process – efficient processes for accessing and receiving services

Physical evidence – demonstrating your effectiveness and impact through facts, statistics and performance indicators; professional and well presented physical and digital premises.

**Getting your message across**

Whatever you provide for your beneficiaries, if you can’t describe it clearly, in a way that engages them, you might as well pack up and go home.

A lot of organisations take their purpose and how they describe it for granted, and then wonder why their competitors, whose stories are stronger, get all the support.

An organisation’s messages should describe the need(s) it meets, how it meets it and why it is best placed to meet it.

**The central messages are your Vision, Mission and Values.**

Your vision should describe your ambition for the future – how you want to change the world.

Save the Children’s vision, for example, is: -

Our **vision** is a world in which every **child** attains the right to survival, protection, development and participation.

Your mission describes how you are working to achieve your vision.

Save the Children describes its mission as: -

Our **mission** is to inspire breakthroughs in the way the world treats **children** and to achieve immediate and lasting change in their lives.

**Your values describe what lies at the essence of your organisation – the principles you work to. They act as positioning statements that show why people should invest in YOU.**

Some organisations present these overtly, others don’t.

* Macmillan Cancer Support’s values, for example, are:- [We are personal](https://www.macmillan.org.uk/about-us/working-with-us/careers-at-macmillan/our-values-behaviours.html#290385)
* [We are open](https://www.macmillan.org.uk/about-us/working-with-us/careers-at-macmillan/our-values-behaviours.html#290387)
* [We demand better](https://www.macmillan.org.uk/about-us/working-with-us/careers-at-macmillan/our-values-behaviours.html#290386)
* [We inspire others](https://www.macmillan.org.uk/about-us/working-with-us/careers-at-macmillan/our-values-behaviours.html#290388)
* [We are practical experts](https://www.macmillan.org.uk/about-us/working-with-us/careers-at-macmillan/our-values-behaviours.html#290389)

Your vision, mission and values are the ‘official version’ of what you do – they focus your organisation, provide the ‘corporate story’ for your annual report, website and funding applications and help you keep your activities and initiatives on track (i.e. if you’re doing something that doesn’t achieve your vision and mission, is it worth spending time and energy on it?).

Messaging, however, is much more than just your ‘corporate story’.

Creating an overall statement about what you do (an elevator pitch) helps you put your offer across clearly for everyone you engage with; and developing different messages for different audiences really helps you target them effectively.

Use the following check list to help you think more carefully about your messages: -

**Messaging Check List**

**What is our overall message – or elevator pitch?**

What do we do?

Who is it for?

Why is it important?

An example might be: “We are Teenage Cancer Now. We support young people with cancer, from their diagnosis to treatment and beyond. Whoever they are, whatever they need we’re here to support them and their families; because no-one should face cancer alone.”

**Why should they choose us? What makes us better/special? (USPs**)

What do we do that differentiates us from other organisations?

What special/unique things do we offer?

E.g. “We’re the only organisation supporting teenagers with cancer in Sittingbourne.

We support and guide young people through their cancer journey at every step, because we have the time to explain the things that busy doctors can’t.

We offer a unique ‘buddying’ service so young people and their families can take a cancer expert to their consultation appointments.

Our peer support helpline means that there’s always someone to talk to 24 hours a day, who’s been through the same thing, at the same age.

**How do they get what we offer?**

Contact details are essential.

Everyone should have these key messages and know when to use them – so that everyone uses them consistently.

**Audience Messaging**

It’s helpful if you develop messages for each of your audiences so that you can engage with them on their own terms, in ways that will resonate with them.

**Think about**

* Who you want to reach (audience)
* What they might be like (‘official’? Expert? Scared? Alone? Vulnerable etc)
* What you want to say to them (the relevant messages you want to give them)
* How you want them to perceive you (expert? Caring? A friend? - this will influence the tone you take with them)
* Why they should come to you (usps)
* What you want them to do (calls to action, with how, as well as what!)

**You might want to break your audiences into groups: -**

* Who we help (beneficiaries, their families? Professionals connected to them?)
* Who we want to influence (opinion formers, decision makers, commissioners?)
* Who we want to support us (funders, donors, community groups, local business leaders?)
* Who we want to work with (other not for profits, local groups, potential partners?)

Use the messaging grid overleaf to brainstorm some clear and simple messages for your audiences.

You can also use it every time you’re developing a campaign, or a piece of communications material, to help you look more closely at what you want to say. Use one grid per type of audience.

**Audience messaging grid**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Who are they/what are they like (audience and their attitudes, qualities/interests) | What do we want to tell them? (messages) | How do we want them to see us?  (Expert? Knowledgeable? A friend? Caring?) | Why us (what makes us the best people to come to)? | What do we want them to do?(calls to action) |
| **e.g. Commissioners – experienced health professionals; part of the council/NHS Trust; pressured, cost-conscious** | **e.g. We help and support people with x condition**  **We offer cost-effective, holistic services which will provide you with value for money and your clients with vital support** | e.g. expert, experienced, in tune with their clients |  | **Subscribe to get email updates**  **Comment/engage with us on social media**  **Share stories/testimonials/guest blog posts etc**  **Call us on xxx xxxxx**  **Visit our website** |

**Marketing your product or service**

In marketing circles a lot is spoken about ‘product’. This is often because there is a mistaken belief that only fast moving consumer goods (FMCG) companies carry out any marketing activity!

In the charitable, voluntary or not-for-profit sector marketing is just as important as anywhere else – and for us ‘product’ is invariably about the service we offer our target groups.

**What to consider**

**1. What exactly is the product?**

**Think about what services you provide.**

* What do they consist of?
* Where do people get them – and what exactly do they get?
* When do they happen?
* How much do they cost to deliver – and what price should they be to reflect this?
* What are the real benefits of your products (this is what makes them appealing to customers)?

**2. Who is it for?**

**Think carefully about your audience. There could be more than one.**

* A course or event might be aimed at people aged 16 – 24 but who might recommend it to them? Who might you want to talk to them about it?
* Make sure your marketing is geared towards influencers as well as actual product users.

**3. What do people really need to know – and when?**

**‘Selling’ a product isn’t enough.**

* Obviously you want to tell people how fab your product is – but if you don’t tell them when and where they can get hold of it, and how, telling them an exciting story won’t count for much.
* You also need to think about the timings relevant to them – for example, if you’re targeting students there’s no point sending a flyer to a college and when they’re all on holiday.

**4. What’s the plan?**

**Plan ahead to make sure you’re marketing your product at the right time**

* If you need to undertake certain activities to market your product make sure you’ve prepared them well in advance
* If you’re planning to produce materials to market your product you’ll need to make sure they’re ready when you need them – see the promotion section of this tool kit for timings.

Getting a real ‘handle’ on your product is essential if you’re going to market it effectively. Use the product information sheet template contained in the pages that follow to put all the essential information down on paper. Make time to discuss it as a tem and work out a plan to promote it.

Fill in a product information sheet every time you develop a new service, stage an event, or attend a conference.

**And don’t forget to update existing sheets if your product, service, exhibition or event changes – reviewing them every six months or so will help with this.**

**Product Information Sheet Template**

Use this form to map out the details of individual services and initiatives. It will save you time each time you want to promote them.

|  |
| --- |
| **Essential details**  **Product (e.g. service, course, programme or training event):**  **Your name:**  **Your contact numbers:**  **Your email address:** |
| **Product Description:**  (Go into as much detail as possible about the product – a brief summary of who it’s for and what it’s all about) |
| **Who is the product for? (audience including age group if appropriate)** |
| **How does it meet their needs?**  (please describe the benefits for the customer – e.g. whether it improves their health and wellbeing, helps them cope with a particular situation, gives them advice/support etc etc) |
| **What do they get?**  (Please give details of any tangible things they get - e.g. a friend to talk to once a week, transport to doctors appointments, dog sitting service!) |
| **How do they get the product?**  (Do they have they have to apply? Do they just come in, or phone?) |
| **What are the key dates associated with the product (if any)?**  (Please state the date(s) on which it is happening, and any key deadlines e.g. the next befriending programme starts on October 20th.) |
| **Still thinking of dates, are there any community events/calendar dates where you might promote this product?** (please provide) |
| **What are the costs involved in providing this service**  (Is it free of charge? Do we need a budget to provide it) |
| **What is the proposed price of the product?**  (If this service isn’t free, please give details of the price we should charge, taking into account the internal costs and any profit we need to make) |
| **How can people pay for the product/course/event etc?**  (please give details of any means testing, bursaries and grants, sliding scales of charges etc) |
| **Who delivers this product (other team members etc? You?)** |
| **External Support**  Are there any other people involved in this product/course/event etc? E.g. Partnerships, guest speakers, sponsors etc. If so please give details. |
| **Is there anything else you need to consider?**  (anything not covered above) |
| **What will this product achieve/give us as an organisation?**  (E.g. – will it raise our profile; help us reach more people, help us network with a particular audience) |
| **Are there any strategic objectives attached to this service/product?** |

**Marketing and communications activity (promotion)**

There are many ways you can promote your products and services to your target audiences.

Popular choices for not for profit organisations are:-

* Printed materials (often known as ‘collateral’ – which range from leaflets, flyers and brochures to pop up stands and posters)
* Press and Media relations
* Electronic media – principally your website but some organisations also have plasma screens around their buildings
* Social media – blogging or placing posts on Twitter, Facebook, Instagram and other social networking sites
* Mailings – e-mail newsletters/bulletins and flyers; postal ‘direct mail’ shots
* Open days/networking events – either holding these at your premises or having a presence at an open day or event

The guidelines and processes in the pages that follow give you some basic insight into how to use each of the channels detailed above.

**Printed Materials & mailings (collateral)**

The key to producing printed materials is giving yourself and your suppliers enough time to follow all the processes necessary to get to a high quality end result.

Each year, you and your team should develop a ‘tactical marketing plan’ for your service area, a simple timetable which charts when your key marketing activities should happen and what you will need. This will include the times when you will need materials as part of your marketing.

Planning materials is like planning any project.

Start from the date you want them delivered and work backwards!

Build in all the processes – from your initial discussion of what goes into materials to writing copy, commissioning any illustrations or photography, to design and print (taking into account at least two drafts).

If you’re involving other people in your materials – using their photo, telling their story etc, you must remember to get their consent – see the Case Study Consent forms in the Media Relations section.

**If you’re photographing people under 16 (e.g. if a school is coming in for a session or event) you are required BY LAW to get consent from their parent or guardian to use the images you take. This is easy to achieve – just liaise with the school or college bringing their pupils in and send them consent forms at least two weeks in advance. They may already have consent forms on file for their pupils – then you can just ask them to send you a copy with a covering note declaring that the forms can apply to their visit (giving date and time) to your organisation.**

The relevant photography consent form is contained here.

The following documents are contained in this section to help you take everything into consideration.

* Promotional material Production process
* Materials briefing template (to help you brief designers)
* Photo consent form for under 16s

**Promotional material production process**

The following is intended as a guide to the timetable for producing different types of promotional material so that it can be planned and produced in a considered and consistent way.

There will always be times when we need to produce things at short notice but, wherever possible, it pays dividends if we give ourselves the time to create the best possible results.

|  |  |
| --- | --- |
| **Plan**   * It’s good to plan at least 12 weeks in advance (even if the item you’re producing has a fairly short turn around) * Consider the wider purpose of your materials – how do they contribute to the wider marketing of your organisation?   What other channels should be used alongside them (website? Social media? Etc.)?   * Draw up a project plan which is regularly updated so everyone knows what is required of them – and when. | **When promotional material is needed it works better if it is planned in advance.**  Lead times for different types of materials are given at the bottom of this table.  If the material is being developed with input from more than one person they should meet to agree what they need:-  What is the material meant to do? (Sell a service? Provide information? Answer general questions? Announce or launch something etc.)  Who is the material aimed at  How do you want to speak to them – what tone and level do you want to use  What do you want to tell them - and how much detail do you want to go in to (for a flyer it might be a quick snapshot with the salient points, for a leaflet you might want to give some background etc)  What do you want them to do as a result (do you need a call to action? Where are you directing them to?)  When you’ve decided and agreed those things you should allocate roles and responsibilities for taking care of production:-   * **Who is the first point of contact for suppliers** (e.g. copywriters, designers, stand builders, photographers, illustrators etc)? There should be ONE CONSISTENT point of contact throughout with clear, planned hand over if that person is going to be away for any length of time. The first point of contact is responsible for briefing, instructing and updating suppliers and answering any queries they may have. If other members of the team want to update suppliers they should do so through the first point of contact. * **Who is going to draw up the brief (s) for the project – based on your discussions?** * **Who is going to provide bullet points and information for the copy writer** * **Who is going to source and provide images if we are going to use our own** * **Who has final sign-off of copy and design?**   When you have agreed these things it is useful to agree responsibilities and an order for commenting on/correcting copy and design. A suggestion is:-   * ONE person comments on/corrects the factual accuracy of any copy (usually the person who leads on that service/product) and the accuracy/appropriateness of images, * ONE person comments on/corrects the text provided by the copywriter in terms of tone, typos and grammar, * ONE person sees the text after the comments and corrections have been made and gives it the once over/makes any ADDITIONAL comments before passing it back to the first point of contact before they collate all the comments/changes on ONE copy of the text to send to the writer.   In terms of design you should agree in advance how you would like to review any concepts and final designs – it’s good to make time to do this as a group.  Roles, responsibilities and the deadlines you require stages to be completed by should all go into the brief. |
| **Develop a brief**  Give as much detail as you can in a brief – spending time on it now will save you much more time later in the process | The allocated person should draw up a comprehensive brief for the designer and one for a copy writer if you’re using one.  This should include purpose, target audience, level and tone, kinds of imagery required, shelf life, quantity, size (if printed) and any other special considerations (e.g. positive imagery; large print; different languages etc).  Most important items to include are budget, delivery deadlines (at each stage of the process) and ONE key point of contact.  If providing a brief for a copy writer it should also include bullet points of the info to be included plus links to/sources of any information resources/existing copy you want the writer to consider.  Brief templates are provided on the shared drive (hyperlink to be included when this is done).  When developing a brief make time to meet the supplier in person to go through the brief with them and answer any questions. |
| **First stage copy development**  Make sure your copy writer has access to those with the knowledge to answer their questions but goes through the first point of contact when sharing draft copy | A good copy writer will respond to your brief by telling you roughly how long things will take, how much they will cost and how many sets of corrections are included in their fee. When briefing a copy writer always factor in time for them to do any research and come back to you with any questions as well as doing the writing.  Bear in mind that the writer may have to fit this work around other work so four hours might stretch over more than one day.  If you are providing a writer with several documents to draw their information from highlight the pages and points they should be looking at to save them wading through whole reams of information – this will save them time – and will save you money!  Tell the writer how you want the first draft copy presented – word? Pdf? And when you want it by.  The first point of contact should keep in touch with the copy writer and keep them informed of any additions/changes to the brief. |
| **First stage design development**  Make sure you specify how many design concepts you want to see – too many can complicate matters and you may be charged! | Designers will usually come up with 2 to 3 concepts for you to choose from and will prefer to present them to you in person so that you can all agree on your preferred approach.  They will then go away and work up the preferred concept – usually in consultation with the copy writer so that they are aware of headings and sub headings, graphic devices or particular emphasis that might be needed.  Some designers prefer to work alongside the writer as they develop first draft copy; others prefer to wait for the first draft to be approved so that they can implement any further corrections in situ.  If you plan well in advance you can allow for both these approaches. |
| **First draft copy presented**  Try and keep the approval chain to three members and give each specific things to look for – that way you’ll avoid copy writing by committee and subjective arguments about words | It is likely that you will receive first draft copy by email.  This should go to the first point of contact who will then circulate it for comment/amendment in the order agreed at the planning stage e.g.  **Agatha =** first point of contact, she sends the copy to Archie to check it for factual accuracy,  Archie corrects any errors in the comments boxes in track changes rather than in the actual text, then passes to Oswald for spelling/grammar and flow changes/corrections,  Oswald makes changes to the text using track changes – including any factual changes (in consultation with Archie), then passes the copy to Mary the project leader for approval. If Mary has any overall comments to make she raises them with the team by email and Oswald makes any final changes to wording before passing it back to **Agatha** for sharing with the writer.  Agatha should always be the first and last person in the chain. |
| **First stage design presented**  Try to be objective when looking at design, your view of ‘fab’ might not be your audience’s! | Best practice suggests that the team involved in the project should meet in person, with the designer, to agree the first stage design.  If this isn’t possible the designs should be circulated by email with a set of questions to be answered by all parties so that everyone is addressing the same issues and giving their impressions of how well the design works with the copy. |
| **Second stage copy and design development**  If you give detailed feedback at first draft stage this part of the process should get you what you want | The first point of contact should return all comments to the designer and send the copy changes to the writer – with clear deadlines for receipt of the next draft. |
| **Second stage copy and design presented**  Two sets of corrections are usually enough to get to final draft – if you have planned, briefed and processed properly | By this stage of the process copy and design should have come together in to one piece of work which will probably come to you as a pdf.  The same circulation process should be adopted as with the first draft copy and it is anticipated that there will be much fewer corrections. |
| **Final proof sign off**  Final proof sign off should sit with someone who is good with copy and has an eye for detail | When the designer and copy writer have made their corrections a pdf proof will come to you for final sign off by the person identified at the planning stage. |
| **Print/production**  Factor in the time it takes to produce an item at the planning stage, set your delivery date and work backwards | Usually the designer will oversee print production and this takes a lot of pressure off the project team or individual.  Designers will liaise with the printer and will provide pdf proofs for a final check.  Print schedules will vary according to the medium being used – e.g. digital printing is quicker and cheaper than litho printing but not as good quality.  Always check lead times with the designer at the start of the process but a general rule of thumb is as follows:   |  |  |  | | --- | --- | --- | | **Item** | **Copy and Design** | **Print/production** | | Single flyer | 1 week in total (copy and design side by side) | Digital 1-3 days | | Suite of fliers (up to 6) | 4 days for copy, 1-3 weeks for design | Digital 1-3 days, litho 5-10 working days | | Short leaflet (4 pages A5/A6) | 6 days for copy,  1-3 weeks for design | Digital 1-3 days, litho 5-10 working days | | Brochure/short report (4 – 12 pages A4) | 8 days for copy, 2-4 weeks for design | Digital 1-3 days, litho 5-10 working days | | Long report (e.g. annual report – up to 32 pages) | 12 days for copy, 5 – 8 weeks for design | Digital 5 days, litho 5-10 working days | | Exhibition stand content (this does not include build or stand sourcing) | 4 days for copy,2-5 weeks for design | Depends on content and system lead times – designer would give an approximate lead time on receipt of the brief | |
| **Delivery**  Delivery is the most important date in your schedule. Start with when you need your materials and work backwards (use the same rule for non-print items, like web design and e-mailings) | When you commission promotional materials it is important to bear in mind when you need them and allow a week for delivery ON TOP OF the deadline for completion of print – this is to allow for any changes of plan.  When planning a project start with when you need the items delivered and work backwards so that you’re sure you’re giving yourselves enough time. |

**Brief** your logo here

**Collateral briefing document**

|  |
| --- |
| **Essential details** |
| **Title of project** |
| **Project manager**  **Telephone**  **Email**  **Fax** |
| **Estimates and schedule required by** |
| **Purchase Order Number:** |
| **Overall delivery deadline** |

|  |
| --- |
| **Background – a bit about your organisation and how this project fits in** |
|  |
| **Audience and purpose – who is the main audience for this product and what do we want to achieve?** |
|  |
| **Are there any other, secondary audiences we want to reach?**  **What do we want to tell them?** |
|  |
| **What is the one, over-riding message we want them to get from this product?** |
|  |
| **What tone do we want to use?** |
|  |

|  |
| --- |
| **Our requirements:** |
| **What format do we want this product to be? (booklet, pdf, exhibition stand etc etc)** |
|  |
| **What size?**  **(for printed publications state your desired size but also whether you’re open to guidance from the designer; for exhibition stands please give the exact dimensions of the space it will be going into, plus the actual dimensions you require the stand to be)** |
|  |
| **Is it full colour, two colour or black and white?** |
|  |
| **What other formats do we want it in besides print? (e.g. Pdf, on a USB stick etc)** |
|  |
| **What kind of images do we want (graphics, photos, illustrations etc)** |
|  |
| **If we’re using photography please describe below what is required** |
|  |
| **Practical considerations (please list below any practical devices you want in the publication – e.g. It should be photocopiable, colour coded, durable, is it purely meant for the web, or for print as well etc)** |
|  |
| **Other considerations – please list any other requirements below or things you need to draw our attention to – age range or different languages could be examples of the kind of extras needed** |
|  |
| **Working with sponsors/partners – do you need to put another organisation’s logo on this piece of work? If so, please supply contact details/where the logo can be found and any guidelines for use.** |
|  |

|  |
| --- |
| **Print requirements** |
| **How many copies of this product do you require?** |
|  |
| **Do you have any special print requirements (e.g. Recycled paper)** |
|  |
| **Do you have any specific delivery requirements (if you require quantities to be delivered to multiple addresses please give details below)** |
|  |
| **Do you need to store some of the product at the printers and call it off as required? (please note there is a charge for this and it will be up to you to give us one weeks’ notice of call off requirements)** |
|  |

Put your logo here

**Consent form for commissioning photography of children and young people under 16**

**To (name of parent, guardian or carer)**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Address\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Telephone number**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Email address**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Child’s name and age**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Child’s school (if relevant**)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Location of photo shoot**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**(your organisations) would like to take photographs\*/ make a video recording\* of your child\*/children\* for promotional purposes. These images may appear in our printed publications, in the media, on video/DVD, on our website or on all four. (\* Delete as appropriate)**

**To the parent, guardian or carer Please circle your answer**

May we use your child’s image in our printed

promotional publications? **Yes/No**

May we send your child’s image out with our press

releases (please note that in this circumstance we

would wish to use your child’s full name in the

accompanying text)? **Yes/No**

May we use your child’s image on our website? **Yes/No**

May we record your child’s image in promotional

videos? **Yes/No**

***Please note that websites can be viewed throughout the world, not just in the United Kingdom where UK law applies.***

Please read the terms of use on the back of this form carefully before you sign it:-

**I have read and understood the terms of image use on the back of this form**

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Terms of use

1. This form is valid for \*two years from the date of signing / \*for this project only. The consent will automatically expire after this time.
2. We will not re-use any images \*after this time / \*after the project is completed.
3. We will not include details or full names (which means first name **and** surname) of any child or adult in an image on video, on our website, or in printed publications, without good reason. For example, we may include the full name of a competition prize winner if we have their consent. However, we will not include the full name of a model used in promotional literature.
4. We will not include personal e-mail or postal addresses, or telephone or fax numbers on video or on our website or in printed publications.
5. If we use images of individual pupils, we will not use the name of that child in the accompanying text or photo caption without good reason. And if a pupil is named in the text, we will not use a photograph of that child to accompany the article without good reason. For example, we may include a picture and full name in a press release or of a competition prize winner in another publication if we have their consent. However, we will not include a picture and full name of a model used in promotional literature.
6. We may use group or class images with very general labels, such as “a group discussion” or “working on the project”
7. We will only use images of pupils who are suitably dressed, to reduce the risk of such images being used inappropriately.

*\*Please delete the option that does not apply.*

**Press and Media Relations**

One of the most cost effective ways to raise awareness of your products and services is through the media.

You may have a designated person or team to deal with Media Relations, but they will need the help and cooperation of the WHOLE TEAM.

With this in mind, the **Media Relations procedure note on the next page** is ESSENTIAL reading.

As part of dealing with the media, it’s good to regularly collate the details of people you come into contact with who have really benefitted from your services.

Ask them for more detail and why your organisation is important to them; and whether they’d like to be a case study for the media. In the same way, make sure you have a bank of success stories to hand that are examples of what you do well.

These ‘real life’ examples of your work are a great way of bringing media releases (and printed publications like the Annual Report) alive – and making them interesting for readers.

Rather than getting case studies together at short notice, it’s good to collect them as you go along. You’ll also need the consent of the person you’re using as a case study to talk to the media about them; put them up for interview; quote them /show their picture in the press. The forms contained in this section will help you do this.

The following documents contained n this section provide you with everything you need to help make media relations easy.

* Media relations procedure note
* Press release template (containing instructions on how to fill it in)
* Case study templates (People, Projects/events)
* Case study consent form

|  |
| --- |
| **PROCEDURE NOTE**  **Media Relations** |

**Who deals with the media?**

If you don’t have a designated press officer or team, decide who is going to deal with the media within your organisation.

**What do they do?**

The person acting as first point of contact with the media develops **proactive** media strategy, producing media releases, following them up, arranging interviews, briefing spokespeople and holding press and media events.

They also handle **reactive** media enquiries, liaising between journalists and the Centre and providing them with information and materials as appropriate.

**What is *proactive media relations,* and how does it work?**

Decide how you will share news with the outside world and develop a press and media strategy.

If something important is going on which you think will generate coverage in regional/national press and broadcast media put together a news release and issue it to a list of key media.

You can get the contact details of the media you want to target through access to a media database, if you can afford one; if not it will be a case of googling the publications you want to reach - which you can then use to compile a Critical Media List.

News releases should be sent out by email (to yourself, blind copying the list in) and a copy placed in the News Section (or Media Centre) on our website, with accompanying images when appropriate.

After the release has been sent out follow it up by telephoning journalists to persuade them to cover your work/attend press briefings. Set up interviews if needed.

For major news items schedule a press breakfast where relevant spokespeople brief the media and answer any questions they have. Wednesdays are a good day to do this to generate maximum coverage.

Press breakfasts will require event space and catering, which should be booked in advance. A press pack, containing background information, the media release and any other appropriate materials is prepared in advance and distributed to attendees.

**What is *reactive media relations,* and how does it work?**

Reactive media relations is just like any other business enquiry service. When a journalist rings or emails their enquiries should go to the media person or team who will then brief senior staff, Trustees, spokes people and relevant department heads on press issues.

**How does this affect me?**

We will all end up getting calls from the media.

Transfer them through to the relevant person. When you take a media call, please take the following details BEFORE you transfer it, in case it gets lost:-

* The name of the publication they’re calling from
* Their name
* The best phone number to call them on

It’s perfectly ok to say ‘I don’t know but I’ll forward your enquiry’ – so there’s no need to get embroiled in media conversations.

You may all need to help with running press events. Plan them as much in advance as possible, with a briefing the day before so that everyone knows what to expect.

If you are a departmental manager you may be asked to act as a spokesperson on occasion.

Have a good think about the news in question beforehand and try to anticipate questions that might come up – including tricky ones. You can always ask the journalist to give you an idea of the questions in advance. Your key messages will help you prepare.

If you can afford it, it’s great if you can get someone in to provide media training for all potential spokespeople.

If you already have media contacts (e.g. the CEO may already know several journalists) and they contact you direct you should handle simple enquiries (like requests for event dates, or numbers of foundation students) yourself. If they are asking for comment or an interview arrange a more convenient time to talk to them (be very wary of dealing with contentious issues on the spot) and prepare how you want to answer the questions in advance.

Discuss potential media issues at your regular team meetings and prepare media statements or proactive releases to deal with them.

**When in doubt always arrange to call a journalist back at a more convenient time and talk the issue through with the media person and/or senior staff first. Always ensure that you call back, as failing to do so may lead to more questions from journalists!**

**Media Release Template**

# NEWS RELEASE

**Press Office Contact**: Insert your name, telephone number and email address

**Date of release:** either For Immediate Release or Embargoed 00.01 hours on a specific date

Put your main headline here, in Arial 14pt bold type: e.g.

**Business and volunteers put the wow in Wolverhampton**

Put a sub-heading here in 12pt Arial normal type e.g.

Wolverhampton Volunteer Centre starts new volunteering programme

Local businesses and community volunteers clear local wasteland

Now write the main body of your text. It should be in 11pt and must be line spaced at 1.5

Some tips are as follows:-

1. Put your main news item up front e.g. “Wolverhampton Volunteer Centre is bringing volunteers from business and the community together this weekend to help clear the city’s biggest wasteland. The former car park, which is now overgrown and derelict, will become a community sports centre to benefit the whole community.”
2. Then explain a bit of the background/ or the detail of the story you are telling – bringing out the most salient points e.g. Who it’s for, who’s involved, high profile local people involved if any, unique features, dates and times – always give the day as well as the date, what’s new and exciting about it.
3. Putting a few images in the release will make it more eye-catching for journalists – make sure you have images available for them to use themselves
4. Include a quote from a spokesperson) saying why what you’re doing is particularly good, or why you’re excited to be involved etc, e.g. “This is the first initiative of its kind in Wolverhampton, bringing business and the community together and we’re delighted that we’ve been able to show how volunteering can benefit everyone,” says Chief Executive Ian Davis
5. It’s also usually good to put a quote from someone who is directly involved or will benefit - e.g. in this case “Council budget cuts have meant we’ve been unable to clear this ground”, says Council Leader xx “ WVC have now made it possible through their amazing connections with local volunteers and businesses. I’m so impressed that I’m going along to lend a hand myself”.
6. Always make sure you check your quotes with the person you’re attributing them to – better still, ask them to write you one in the first place!
7. Put any calls to action after the quotes and makes sure you tell people where to go to access more information or do whatever it is you’re asking them to do.
8. End the release with a strong statement that will stick in people’s minds – e.g. The ‘Clearing the ground’ volunteering project takes place on Saturday and Sunday 21 and 22 March – the beginning of a fresh start for Wolverhampton’s most derelict area.

**Ends**

For more information call (your name) at (your organisation) (and your project) on (your number) or email them at (your email address)

(Include any extra information in here, e.g. If you’re only available on Tuesdays

**Notes to editors**

**About xxx (your organisation)**

**This is normally your ‘elevator pitch’**

**For more information about our work – and how you can get involved – visit our website**

**Your web address**

**(The above is known as your boiler plate information)**

**About xxxx (the project, and the news story attached to it)**

Provide some information about your news story here if you need to – e.g. if you’re writing about an exhibition and it’s free

Note: If you are working with another organisation, or a sponsor you must ask them for their ‘boiler plate’ information to put in these notes – i.e. the same kind of info as ‘About xxx above nee

**Case Study Template: People**

Collecting real life examples of your work will help tell your organisation’s story and raise its profile in the media, in marketing and promotions materials and in discussions with stakeholders.

Case studies are also invaluable in demonstrating the impact of your work and encouraging your audiences to engage with it.

Use the template below to put simple case studies together which you can either give to journalists – or use to construct your own stories. Whatever you do, always remember to check the details with the person/people involved and ask them whether they are happy to a) have their information shared with others b)be quoted in the media c) talk to journalists about their experiences.

The template can be adapted into a questionnaire and you can ask case studies to fill them in – but a face to face chat usually gets better results.

**Tell your story**

1. **Basic details**

|  |  |
| --- | --- |
| Case study’s name |  |
| Gender |  |
| Age |  |
| Contact details  Phone  Email |  |
| Is the person happy to speak to the media? |  |
| If so, when is usually a good time for them to talk on the phone? |  |

1. **Short description of the case study**

|  |
| --- |
| Use this space to give a bit of background about the case study. The following questions might help.  1. Tell us about your involvement with us – what particular service/event/course/campaign etc were/are you involved in?  2. How long did it go on for?  3. What did you do?  4. What were the outcomes? |

1. **The case study’s experience**

|  |
| --- |
| Ask the case study what their experience was like – the following questions might help.  1. What was it like being involved in x, working with our team on x?  2. What did it help you with/what did you learn?  3. What was good about it?  4. What wasn’t so good?  5. What would you tell others about xx/tell others to do? |

1. **Other details**

|  |
| --- |
| Always encourage the case study to tell you anything else they want to say about their experience – you quite often get good quotes this way. Some guiding questions are:-  1. What has this experience meant to you, personally?  2. Is there anything else you’d like to share about xx?  3. Was there anyone who particularly inspired you when you were involved in xx? |

1. **What’s next?**

|  |
| --- |
| Always ask your case study what they’re going to do as a result of their experience.  A simple “So, what are you going to do next? Is all it takes. |

**Case Study Template: Projects and events**

Collecting real life examples of your work will help tell your organisation’s story and raise its profile in the media, in marketing and promotions materials and in discussions with stakeholders.

Case studies are also invaluable in demonstrating the impact of your work and encouraging your audiences to engage with it.

Use the template below to put simple case studies together which you can either give to journalists – or use to construct your own stories. Whatever you do, always remember to check the details with the person/people involved and ask them whether they are happy to a) have their information shared with others b)be quoted in the media c) talk to journalists about their experiences.

The template can be adapted into a questionnaire and you can ask case studies to fill them in – but a face to face chat usually gets better results.

**Tell your story about a particular project, course or event**

1. **Basic details**

|  |  |
| --- | --- |
| Course/project/event name: |  |
| Duration: |  |
| Where it happened: |  |
| Who was involved internally? (Name, position, contact) |  |
| Who was involved externally? E.g. sponsors, specialists/experts  (Names, positions, contact) |  |
| Are the external people happy to talk to the media? When? |  |

1. **Short description of the project/course/event**

|  |
| --- |
| Use this space to explain what happened:-  1. What was the particular course/programme/project/event/piece of news?  2. What did it aim to achieve?  3 How many people were involved – what kinds of people were they?  4. How long did it go on for?  5 What happened?  6. What were the outcomes? |

1. **Key features of the project/course/event**

|  |
| --- |
| 1. What needs did the project seek to address? (if you have any useful stats here – e.g. xx% of refugees entering the UK feel isolated and excluded; xx organisation’s regular networking event was set up to help them make contacts, friends and connections)  2. What was special about it/different to what others are offering?  3. What was good about it – how did people benefit? |

1. **What did people say?**

|  |
| --- |
| Get some quotes from participants, trainers, speakers – the key people involved – that you can use to provide evidence of how the project/course/event went |

1. **What’s next?**

|  |
| --- |
| What does your organisation have planned now that this event has taken place? More? Revised approaches?  What does it hope to achieve? |

# Your logo here

# 

# Case Study Consent form

**Promoting the work of** (your organisation) **– telling your story**

We would like to use your recent experience as an example to tell other people and organisations about (your organisation). We will use it as a case study or good news story to show other people how our work makes a difference.

## How will my story be used?

* We may use your case study in newsletters, magazines, leaflets or on our website. We would like to use your photograph to accompany your case study wherever possible. Occasionally, we might want to interview you to gather more information.
* We may refer to your case study on a radio station or on TV.
* We may use your case study in local and sometimes national newspapers.
* We may share your case study with other training and education organisations, government departments or statutory bodies to show what can be achieved
* We may also use your case study with potential funders, supporters or partners to give them a real life example of the work they are supporting

**We will share your written case study or press release with you before we use it for promotional purposes**

# CONSENT SECTION

Part 1 **– For completion by the person either giving or seeking consent**

|  |  |  |
| --- | --- | --- |
| **Name of person giving consent: (print name clearly)** | |  |
| **Details of (your organisation) contact (Name, email and/or phone)** |  | |

Part 2 **– Must be completed by person giving consent**

We need your consent before we can use your story.

**Please tick (✓) the boxes below where you agree to give your consent**:

|  |  |  |
| --- | --- | --- |
| **I give my consent for (your organisation) to use my case study in the following ways:** | **To use my name** | **To use**  **my photo** |
| In publicity materials – including booklets, digital media (e.g. websites), feature articles (magazines), radio, TV, local newsletters, exhibitions, posters, etc |  |  |
| In newspaper articles (some articles may also appear on the newspaper’s website) |  |  |
| In presentations, speeches or in written reports e.g. our annual report |  |  |

**Anonymity:** In exceptional circumstances we may be able to use your case study without using your real name, for instance, if there are sensitivities around information you have provided. However, this would greatly limit the use of your story in the general media and we may not be able to use it at all.

**I agree and understand:**

My case study may be used for up to 12 months. After this, it will no longer be used in new material.

This form will be kept for 24 months. After this, it will be destroyed.

I can withdraw my consent to (your organisation) using my case study at any time, by contacting xx at (insert relevant email address)

|  |
| --- |
| **Signature of person giving consent:** |
| **Date:** |

**Media Relations in a crisis situation**

Openness and transparency are vital in marketing an organisation effectively – as is showing responsibility and accountability.

Publishing the audited accounts, making minutes of key meetings available and explaining all decisions and procedures clearly are essential in showing that you have nothing to hide as an organisation.

In the same way, it is important to have a plan in place for when things go wrong.

If someone is badly injured or dies; if a criminal offence is committed by your staff or on your premises; if one of you is involved in criminal activity in their personal lives it could severely damage your organisation’s reputation.

To prevent this happening, you must have a crisis PR plan in place – which is followed by the whole organisation when a crisis happens, with a small team of people (usually the media relations person and senior managers) to manage the crisis.

For most of us this will simply mean:-

* Keeping the incident strictly confidential both within and outside the organisation
* Referring any press or public enquiries straight to the head of the Crisis Team without entering into any conversation with them about the incident (it can be tempting to speculate, offer eyewitness accounts or give an opinion but this should not happen in any circumstances and could result in dismissal)
* Carrying out any instructions given by the Crisis team

For senior managers it will mean following a strict procedure and meeting, out of hours if necessary, to address the issue; develop a response; and communicate this clearly to the media.

Crises very rarely happen, but it’s important to be prepared. The procedure note which follows will help you develop your crisis plan – but remember, every organisation is different and you will need to consider your own circumstances carefully.

**Public Relations Crisis Management Procedure**

# What is a crisis?

A crisis is an event which causes the organisation to become the subject of widespread, potentially unfavourable attention from the media and other groups such as members, employees, politicians and other pressure groups who have a vested interest in the activities of the organisation.

Crisis management is ***reactive***, dealing with a situation after it becomes public knowledge and affects the organisation. It normally has a clear focus, a finite set of actions, audiences and information that needs to be communicated within a short time scale.

**Planning For Crisis Management**

There are six steps for effective crisis management:

1. Cataloguing potential crisis situations
2. Devising policies for their prevention
3. Formulating strategies and tactics for dealing with each potential crisis
4. Identifying who will be affected by them
5. Devising effective communications channels to those affected so as to minimise damage to the organisation’s reputation
6. Making a relevant public statement where appropriate

**It is also extremely useful to test everything and rehearse likely scenarios – with external facilitation from a media expert.**

# How to take this forward

* Set up a crisis team to enable swift, organised and informed action should a crisis occur.
* The team should be available for contact out of office hours and prepared to meet at a suitable venue/your premises if the crisis demands it.
* Each member of the team should have a back-up/deputy so there is a full quota if anyone is on leave/sick.

The crisis team should include:

* Director
* Senior management team
* Chair of Trustees – or nominated Trustee
* Whoever takes responsibility for PR within your organisation

All the crisis team members and their deputies should be able to:-

1. Have access to your premises and know how to operate the alarm systems if they are the only people onsite
2. Have each other’s home and mobile numbers as well as contact numbers of their teams if the crisis requires
3. Set up a telephone conference call, or meet face to face if more appropriate
4. Know how to operate key equipment including switchboard, photocopiers, faxes, CRM, website email
5. Know the agreed procedure for managing a crisis situation.

## Six steps of crisis management

## 1) Cataloguing potential crisis scenarios

The crisis team should meet to consider all potential crisis scenarios. A few examples of crisis scenarios are given here, but all eventualities should be considered.

* Beneficiary or staff member is seriously injured or dies at your premises whilst using equipment or facilities
* Event space hirer(s) poisoned, injured, killed or abused at your premises
* Course attendee sues for health and safety negligence
* Local residents accuse your organisation of unethical practise
* Allegations of physical or sexual abuse
* Financial irregularity or fraud by internal personnel
* Trustee has conflicting interests
* Partner or associate accuses you of intellectual property theft, or copyright breach
* Building burns down
* Investments in unethical shares
* Serious breach of data protection – e.g. data goes missing/falls into the wrong hands
* Staff, volunteers, or Trustees are involved in serious mis-conduct on social media
* Mis-appropriation of funding, sponsorship or gifts in kind
* Fraudulent fundraising in your name
* Funding from questionable/unethical sources
* Chief Exec sits on a committee that produces a report at odds to charity policy

## Devising policies for their prevention

The team should then ensure that policies exist to help prevent the crises. In some cases these may already exist, but others may need to be formulated. Crisis prevention plans need to be collated in a central file and shared with all of the crisis team.

For each scenario, the crisis team should know and agree what actions & policies are in place to prevent the crisis happening, recommending any amendments if necessary.

**Collate your existing policies and ensure outstanding policies are written; keep them in a central crisis file.**

## 3) Formulating strategies and tactics for dealing with each potential crisis

If a crisis does occur the crisis team will need to move swiftly to deal with it. All crisis team members should have the right telephone numbers, contact points and clear procedures for action. The team should consider all the crisis tasks on the basis of the problem and divide them up e.g. contacting all those involved in crisis for their input on the event; developing a list of all those within the organisation and externally who need to be informed of the crisis.

Agree strategies for dealing with potential crises and ensure these are added to the crisis file

4) Identifying who will be affected by them

For each scenario the team will need to think about the people affected by the particular crisis. Who needs to know what and how quickly?

It is important to plan for calls from relatives in the case of an accident.

**Ensure resources are in place for handling public enquiries during crises**

5) Devising effective communications channels

To react and act quickly in a crisis the crisis team need to agree on communications channels. The following procedure is suggested:

i) The staff member who takes the call from the initial enquirer should find out as much detail as possible about the crisis, explain that a response will be issued as soon as possible and take their contact details.

If the initial enquiry is from a journalist the person should find out what their deadline is.

ii) The staff member should contact a member of the crisis team who will then contact the other members. If out of hours, the crisis team should arrange if appropriate to meet. **IT SHOULD BE NOTED THAT CRISES REQUIRE IMMEDIATE ACTION – IF A MEMBER OF THE TEAM’S INPUT IS NEEDED IT MAY BE NECESSARY FOR THEM TO RETURN FROM HOLIDAY/CONFERENCES IF THE SITUATION IS SERIOUS ENOUGH.**

iii) As a team they should consider the crisis tasks on the basis of the problem (using information and actions agreed in step 3)

iv) The person responsible for media relations should develop the holding statement for the media, in consultation with the Director and all others concerned with the crisis. The team should agree the statement as soon as possible and ensure that all understand the response before it is made public.

v) Issue statement to media and relevant others (e.g. police, fire services). A key contact list with telephone numbers, including key national press will need to be kept and updated.

vi) Fielding calls

Those handling inquiries (from press or others) should be careful not to speculate on the cause of the crisis or admit liability. Background information on the organisation / activity which has been affected will be offered to the media to give breathing space and demonstrate that the organisation is cooperative and will communicate with it. Extra staff may need to assist the press team with fielding calls.

viI) Set up a press centre

If a crisis happens off site and is deemed serious enough, a press centre near to site should be set up and press conferences should be held once or twice a day at 10.30 / 15.30. TV interviews should be arranged for afterwards (although camera crews should be admitted into the press conference too)

**Making a relevant public statement where appropriate**

The following statements are suggested

**PRESS STATEMENT – FOR ACCIDENTS, FATALITIES etc**

“(Your organisation) confirms an incident (state if known) has occurred (state where and when) and coordination of emergency rescue services is being controlled by the sites emergency committee.

Firm details about the incident are not yet known, but every possible action is being taken to safeguard lives.

Background information about the activity/site is attached and more information about the incident will be released as soon as it is available. The following special telephone number has been issued by (your organisation) for media enquiries relating to the incident”

**PRESS STATEMENT – FOR FRAUD, HUMAN ERROR, ABUSE etc**

“The charity was not aware/has only just been made aware of the situation/problem and will/is currently investigating the matter further. The charity has clear policies/procedures on these matters and if these have been broken it will act swiftly to rectify the situation.”

**Digital Media**

Often, an organisation’s single biggest communications interface with its stake holders is its website.

In the early days, websites acted mostly as ‘shop windows’ providing information about history, rationale, offer and services of organisations.

Nowadays, the sky is, almost, the limit – with web content coming from users of sites, as well as their owners, and features becoming more and more interactive.

As well as having a website organisations use multiple digital platforms from portals and gateways to social media sites, and it can be very tempting to make digital media your predominant communications channel.

However, don’t forget that there are still many people in the UK who do not have access to a computer, or don’t know how to use one – particularly disadvantaged and itinerant groups, and the older population – so don’t put all your eggs in one (virtual) basket.

Websites can cost anything from £2k (usually for the build, with the content provided by volunteers) to £50k and beyond, if you’re a whizzy corporate company but the golden rules for a successful website are: -

* Get a simple Content Management System (CMS) that everyone can use and which is easy to update when new versions become available (word press is a popular choice). Don’t be tempted to get a bespoke system that someone tells you is ‘state of the art’
* Appoint a small number of people (no more than four) to edit your website and make sure they are fully trained in the CMS
* Make sure your website is fully accessible to people with visual, and other, impairments and that it is in plain English
* Invest in decent images
* Keep navigation as simple and intuitive as possible
* Do NOT cut and paste content from elsewhere to form your web content – it should be exclusive to your website unless it is a downloadable document
* Keep your website current – update it regularly
* Check regularly for broken links, out of date content and typos
* Plan your web content carefully – when you introduce new services, have a new partnership, or take on a new project don’t just ‘bung it on the website’ – ask yourself if it fits with the rest of the content and what you need to support it (downloadable materials? Links to other sites? A discussion forum?). If you allow your website to grow too organically it could get out of control!
* Provide your web address at every opportunity – or URLs to relevant content – reference it in your other communications such as press releases, flyers and brochures.

The guidelines overleaf will help you write for the web – it is a different ballgame to writing other materials.

**Writing for the Web**

Writing for the web is very different from writing for print. Key reasons for this are:-

* Users scan web pages rather than reading every word
* Users typically won’t give a web page their full attention. For example they may also be listening to music and using instant messaging.
* Web pages are interactive.

**The six elementary rules**

George Orwell’s rules are just as relevant today, for the web:-

1. Never use a metaphor, simile or other figure of speech you are used to seeing in print

2. Never use a long word when a short one will do

3. If it is possible to cut out a word, always cut it out

4. Never use the passive where you can use the active

5. Never use a foreign phrase, as scientific word or a jargon word if you can think of an everyday English equivalent

6. Break any of these rules sooner than say anything outright barbarous.

**Organising your page**

The structure and organisation of your content should generally be very different to that of a print version:-

**Introduce the page** – help the user to know they’re in the right place. Give them a short outline of what they can expect if they read on. Do not repeat the page title.

**Important content first** – What is the main point of the page? Give the user that information or message first. Anything else can follow.

**Short and simple** – users will be looking for specific information. Being concise and ensuring that you use easy to understand language will help them to find it. If the information is necessarily very long, a PDF download may be more appropriate. Web content will typically be about half the length of print content

**Don’t repeat content** – If it’s been said elsewhere, link to it. This will keep your pages shorter and remove the administrative burden of having to keep checking whether updates are needed.

**Highlight key points** – use visual cues to make important content stand out. Someone scanning your page will be more likely to spot this content and read it. Examples include:-

* Subheadings
* Block quotes (“call outs”, “pull quotes”)
* Bulleted or numbered lists

**User focused content** – know who your audience is and use appropriate language to ensure that they understand you. Make sure that any background information they need is available and obvious. Use a friendly (but not over-familiar) tone, but don’t distract users with jargon or over-used phrases.

**What next?** – Give the user something to do next. For example, by putting links to other, related, articles at the bottom of the page; offering subscription to a mailing list.

**Use keywords** – make sure you use relevant key words – words and phrases that your users would use – within your content, especially within headings and the first few paragraphs. This will optimise your page in search results as well as reassuring the user that they’re looking at the right page.

**Regular revisions** – It can be frustrating to come across a page with out of date or inaccurate content. Make sure that every page has an ‘owner’ responsible for updating it or removing it if it’s no longer relevant.

**Accessibility**

This is very important. Not all of your users will have the same ability to view your content.

This could be because of outdated software, missing plug-ins, or because of a physical disability. There are many different points to bear in mind, though many of them will be dealt with from the technical end by your Content Management System (CMS).

Some of the most important considerations are:-

1. Image alt text

a. If an image conveys a message, make sure you supply alt text to give that message to people who can’t see the image

b. If the image is purely decorative leave the alt text blank

2. Link text

a. Make sure that the link text tells the user what to expect if they follow that link. Never use ‘click here’ or similar – it doesn’t give useful information (and not all users can ‘click’)

b. E.g. For information please **contact us** rather than “**Click here** to contact us.”

3. Page structure

a. Structuring your page, using headings, lists and so on, is a big help not only to people who can see the page but also to screen-reader users

4. Simple writing

a. Ensure content is clear and simple.

**In Summary**

* Content should be short and to the point
* Put key information at the beginning and elaborate
* Structure is good. Use sub-headings, short paragraphs of a few sentences and lists.
* Don’t use jargon or slang
* Don’t just paste in content from another source, be it print or a previous web version
* Do an online version of a download unless it doesn’t translate for the web (i.e. if it’s too long, or unsuitable for HTML)
* Keep your content up to date and accurate
* Make it obvious what’s next
* Keep accessibility in mind.

**Social Media**

More and more organisations are using social media to market their services and connect with their audiences; principally to raise awareness and increase understanding about the cause they support, to promote services and increase profile.

Some organisations have one or two people who take responsibility for posting on social media but they can’t do it all on their own. It is up to everyone to put forward interesting news, comment and information to keep your social media presence current and relevant.

The NCVO Know How Not Profit website <https://knowhow.ncvo.org.uk/> provides ‘How to’ guides on everything -including social media – and as social media sites are changing all the time it is best to access the latest guidance there.

The following two articles are excellent background to improving your social media function.

<https://knowhow.ncvo.org.uk/how-to/how-to-choose-the-right-social-media-platform-for-your-organisation>

<https://knowhow.ncvo.org.uk/how-to/how-to-develop-a-social-media-strategy-for-your-organisation>

Use the guidelines on the following pages to learn more about Social Media.

**Social Media Guidelines**

**What is social media?**

Social media is a term that describes websites that provide user-generated content. Whereas traditional media is controlled by editors, social media allows users to dictate the agenda.

Social media is growing all the time, and with so many outlets and often limited resources, it can be hard to decide on the best social media sites to invest time in.

**How to decide which sites to use**

Things to consider when choosing social media outlets are:-

* **Target audience** - make sure you choose a social media platform that is used by the people you’re targeting. For example, It is no good spending time building a profile on LinkedIn (used as a professional networking tool) if the majority of your audience is teenagers who are heavy Facebook users. Do some research and have a look at who uses the various social media sites.
* **Popularity** - social media platforms that have millions of users such as Facebook or Twitter will mean more people are likely to see your organisation and therefore should drive more traffic to your website. However, there may be smaller, more niche outlets that are populated by people with a specific interest in your cause. Above all, make sure you choose outlets that are popular with your intended audience.
* **User-friendliness** - you don’t want to spend hours and hours getting to grips with the social media outlet only to find it’s too complicated for your colleagues or supporters to engage with. Think about how easy it is for your intended audience to use the outlet you choose; and how easy it is for you to manage it.
* **Two-way communications** - social media outlets that have comment and discussion boards, forums or the ability to leave messages are good for building dialogue between you and your followers. Be careful about how many of these sites you choose to be involved in though. If you invite people to join debates or ask you questions, you’ll be expected to respond!

**Which sites to use for which activities**

The table below shows some common activities and suggestions for which social media sites could be used.

|  |  |
| --- | --- |
| **Your aim** | **Outlets to consider** |
| To get people to sign up to a campaign/pledge | Facebook, Twitter |
| To attract donations | Facebook, Twitter, Instagram |
| To show progress/demonstrate impact | Flickr, Facebook, YouTube, Podcasts, Instagram |
| To share knowledge | Wikipedia, blogs – e.g. blogger, WordPress, |
| To alert people of events or activities | Upcoming, Meetup, Twitter |
| To build communities | Facebook, My Space, Bebo, Twitter, Instagram |
| To recruit volunteers | Facebook, Twitter |
| To recruit staff | LinkedIn |

**Here are some practical tips about getting the most out of social media in your activities.**

**Running a campaign**

As well as using more traditional methods to drive your campaigns – marketing materials, website, print and broadcast media, events etc – social media is good way to boost your potential audience.

Before using social media to run a campaign consider the following points:

* **Think about your audience** - which websites and social media outlets do your target audiences use? These are the ones you should use for your campaign
* **Interaction** - a key part of social media campaigns is interaction with your prospective supporters. This group will become your biggest advocates and should feel passionate about spreading the word about your campaign to more people to build more support. Allow them to talk to each other by creating ‘campaign’ pages on sites such as Facebook. Encourage supporters to recommend the campaign to their friends and to pass on links and spread the word. They might also write blogs, upload photographs or share videos on campaign activities they’ve undertaken.
* **Be fluid** - like any campaign, those driven through social media shouldn’t be static. It’s important to keep updating information and introducing news aspects to the campaign so people maintain interest. Multimedia might play a role here – allowing you to refresh content by presenting short videos, podcasts or hosting interactive web chats.
* **Be prepared** - if your campaign goes well, it may be that you get lots of website hits, queries and applications or bookings. Make sure you are prepared for that.

**Sharing knowledge**

Many social media outlets thrive on people offering advice, sharing resources and promoting expertise. Charities can use these sites well to help demonstrate their impact and reach more people. Here are a few suggestions for maximising those opportunities:

* **Knowledge-sharing websites** – KnowHow NonProfit is a great example of an online community where organisations and individuals with a common interest can get advice and share ideas. There are hundreds more sites for specific topic areas – mumsnet and Begrand.net are examples in the family sector. Consider joining these forums and offering advice where appropriate.
* **tweet advice** – the Media Trust does tweets throughout the day with tips on a different communications topic each day. You might think about doing something similar, providing your followers with an insight into your knowledge and expertise, but also some practical advice.
* **showcase service users** - encourage service users and those involved in your organisation to get involved in your social media
* **ensure stats are visible** - think about revealing a compelling statistic on your Twitter feed every week, relating to your field of work
* **Wikipedia** – here you can contribute to definitions and explanations of a whole range of topics and on a variety of subjects.

**Alerting people**

Whether it’s a new campaign or a breaking piece of news – use social media to alert your followers quickly.

* **Micro-blogging sites** such as Twitter are great for sending out instant, short messages to your followers. To widen the numbers of people seeing your message, use the hash tag function (#). This ensures your message will get posted on relevant discussion threats. For example if you’ve got a conference on an issue relating to world homelessness day post your comment followed by #worldhomelessnessday and it will be seen by all those accessing that discussion thread.
* Social networking sites including Facebook will alert people when a new message arrives from a group they’re part of. If you’ve got information to convey, using this method can be quick and effective.

**Recruiting staff**

As well as the traditional methods of newspaper and trade magazine advertisements, a cheaper alternative is to advertise vacancies through your social media networks. Many organisations tweet their vacancy and encourage others to re-tweet – providing a link to your website where the job description and application details appear in full.

You could also use LinkedIn, the professional network, to draw attention to your vacancy. Again, those interested should be referred to your website for more details.

**Building communities**

Social networking is a major part of the social media scene. Whether you're using Facebook, Bebo, MySpace or Twitter, there are numerous outlets for bringing people together, hosting discussion and generating ideas.

Building communities is a major part of what non-profit organisations try to do – and a key function of social media.

See [social networking: best practice](http://knowhownonprofit.org/campaigns/communications/effective-communications-1/social-networking-best-practice) for tips and advice on how to best make use of social networking for building communities.

**Influencing agendas, positioning your organisation**

Social media can be a key means to positioning your organisation – reaching a wide audience and giving it a voice.

* **Contribute to relevant debates** - keep an eye on the top blogs in your sector/area of interest and post comments if you’ve got something to add to the debate. Similarly on Twitter, ‘follow’ people who comment on topics relevant to you organisation and if they tweet something interesting, message them back – and/or retweet to your followers.
* **Be relevant and interesting** - tweeting or blogging can be great for giving your organisation a voice and help with positioning. However, to ensure you make the most of social media, it’s important not to ‘tweet’ or ‘blog’ or ‘post’ on various outlets simply for the sake of doing so. Make sure whatever you do is relevant, timely and interesting to your followers.
* **Your organisation’s reputation is at stake** - if you are using social media on behalf of your organisation, remember that whatever you post on a website, blog or Twitter reflects on your organisation. You should consider with colleagues what tone you want to present in your social media activity and what topics you want to comment on and which should avoid. Do you want to be seen as informative, knowledgeable, reliable – or opinionated, challenging and confrontational? As with all traditional marketing and PR material, it’s important to have some key lines that you can draw on across various topics so that you can react quickly to social media trends.

**Generate feedback**

Knowing your audience and addressing the issues that matter to them is importance for any organisation. Social media can help you communicate effectively with your current and potential supporters - and respond to their feedback:

* **create a dialogue** between your organisation and its audiences – whether that’s the public, service users, politicians or the media. Use your Facebook page and Twitter feed to pose questions and encourage followers to share views.
* **Be responsive** - remember, if you want people to ask questions, and then make sure you respond to them promptly and in sufficient detail.
* **Keep blogging** - blogs are a great way of putting your organisation’s views into the wider world – and inviting responses to them. Aim to build up followers and encourage them to post comments and give you feedback.

**Communicate internally**

More and more organisations are using sites like Facebook as a cheap way of communicating with staff. You can set up ‘closed’ groups to create a message board on certain topic – inviting staff to contribute ideas as well as keep up to date with the latest news and updates from the organisation.

**Make sure you have a social media policy**

To safeguard your organisation, and ensure that everyone knows their responsibilities around social media it is important to have a social media policy in place.

**An example social media policy is included in this tool kit at Appendix Two**

**Useful links**

* [Traffikd.com](http://traffikd.com/social-media-websites) is regularly updated and lists social media outlets under different categories – including health, news, music and technology.
* [Social media questions (ICT champions)](http://www.ictchampions.org.uk/FAQs/social-media/) - practical guides written in plain English.

**Events, shows and Open Days**

In the course of your work you are likely, at one time or another, to have to staff a stand at a community event, open day or conference.

Developing your presence at a community fair or event takes a lot of planning.

**The most important part is deciding exactly what you want to achieve by attending and setting clear objectives for achieving it.**

**Then plan exactly what you want to present to people attending the event**

Who is the target audience likely to attend – and how will you appeal to them?

Is there a particular theme you need to adhere to?

Do you want to give them information; let them try out a particular tool or service, show them what we do; – or all three?

Will there be interactive sessions on your stand – and if so, what equipment will you need and what are the health and safety implications?

Will you hold a launch or seminar in another room on site?

Do you want to gather feedback on your stand?

What marketing materials will you need on the stand?

Do you want to provide ‘give-away’ materials or hold a competition on your stand?

**Make sure you have everything you need for your stand well in advance**

If you use pop up stands, always check them regularly – if you do a lot of events they can get damaged, and there’s not much you can do about that if you only check them the day before

Do you have enough printed materials and ‘give-aways’ – if not order more

**Make sure all the logistics are right**

Do you have the right numbers of staff available for the event?

Is there a clear rota for attendance – and a contact list so that everyone can keep in touch?

Do you know what you want people to do and say on the stand?

Have you organised a series of briefings to take them through what’s required?

How will you get everything to the venue – and what are the arrangements for taking the stand down at the end?

Where can people store their personal items at the show to avoid an over cluttered stand?

How do you capture data from attendees at the event?

**All your hard work doesn’t end with putting your stand up at the event. Your presence there, and how you use it are key to marketing your organisation and what it does.**

Staffing a stand is hard work – and can be very boring – but it is essential to remember that you’re on show at all times and representing the organisation whilst reaching out to your target audiences.

The following tips will help you run a stand effectively:-

1. Don’t expect your stand to do everything for you! An over-cluttered stand, with mixed messages and loads of stuff around the place looks like you don’t know what you’re doing. Less is more.
2. Make a list of everything you need to take with you and check it at key points to make sure your stand is fully stocked with relevant contact forms, marketing materials and a ‘kit’ of pens, sticky tape and wet wipes!
3. Turn up in plenty of time to get your stand in order before attendees are on site
4. Always have at least two staff on your stand at any one time so that it looks busy and welcoming – if you’re a small organisation volunteers can be a great help with this– but make sure they are fully briefed
5. Make sure staff are on message and appropriately dressed – appearances matter and so does knowing your subject (Would you buy a computer from someone who looked scruffy and didn’t know what they were talking about?)
6. Make friends with your neighbours – people on neighbouring stands can be good allies in sending people your way
7. Don’t pounce on people! Be friendly; talk to them about the things they are looking at; ask them what they’re looking for; show them things that relate to what they tell you.
8. Ask questions. Find out who the visitors to your stand are and what they do. If they’re not your target customers be friendly and polite but don’t waste too much time on them.
9. Collect information. Whether you use a scanning device, a form or computerised registration, make sure you capture as many contact details as possible – they could generate new clients, partners or supporters
10. Follow up; follow up; follow up. Debrief as soon as possible after the event. Discuss what went well and what didn’t – and how you can improve for next time. Share out responsibility for following up with all the people who left their details. Use all this information to plan for next time and make sure all details are put on your database.

**Marketing Planning**

Whether you have a full marketing team at your disposal, or a small bunch of volunteers who ‘give you a hand’ it means nothing unless you plan your tactics carefully.

Planning once a year, and reviewing your plan half way through the year, makes your marketing more effective and saves you the stress of the ‘knee jerk response’ to things as they happen.

**Planning always starts by looking back.....**

Towards the end of each year use your product information sheets to take a long, hard look at the services you are delivering. Compare where you are now with when you filled the sheets in and ask yourself:-

**Does this service meet the needs of our target audiences?**

(If you don’t know it means that you haven’t been gathering feedback during the year to find out)

**What do we need to do to meet those needs more effectively?**

(The answer probably lies within the feedback you’ve gathered – or in your own assessments of how things have been going throughout the year)

**Has anything in the internal (budget cuts, new staff etc) or external environment (changes in government policy; new techniques; a new competitor in the field) changed – and if so how does this affect the service we deliver?**

**If we’re changing our service what’s different and what makes it special?**

Revise your product information sheets and use them to help you plan how you are going to market those products/services in the coming year.

**Before looking forward.......**

Think about what might be coming up in the year ahead. What are the regular ‘spikes’ you know make up a typical year in your organisation and in the world at large? What do you want to promote in the coming year? What new projects and services will be on offer? What events in outside world could you use to your advantage (new legislation, public announcements etc).

**And planning ahead**

Develop a communications plan.

Depending on how big an organisation you are, and the resources you have, this may be a ‘plan on a page’ with some general principles of what you’d like to communicate overall, and specifically, quarter by quarter; or a full-blown communications strategy that sits alongside your business development plan.

In time, as new services are added and become more complex it may be time to develop individual communications plans for each service.

If you are in doubt about how to do this – take a look at the KnowHow Notprofit website already mentioned in this tool kit or get a communications professional in to help you run a planning day.

**Measuring and Demonstrating your impact**

Whether you’re applying for funding, reporting back to supporters or presenting at your AGM, it is important to demonstrate the impact of your work.

There are a number of ways you can do this: -

* By developing key performance indicators (KPIs) for everything you do and collecting evidence to show you’ve met them
* By regularly gathering statistics (numbers of people helped; numbers taking up a particular service; number of people benefitting from your support (e.g. getting a job if you’re an employment charity) – and comparing them with the national average
* By collecting personal success stories (and also stories that demonstrate why you’re needed)
* By employing scientific measurement metrics to assess specific outcomes
* By conducting surveys and other market research and publishing the findings

**Take a look at NCVO’s How to guides to find out more**

<https://knowhow.ncvo.org.uk/how-to/@@search?search=measure+impact>

**Evaluation and Feedback**

It’s essential that you get your customers’ take on how effectively you’re marketing your organisation, as well as your own.

Evaluating your work, and awareness of your organisation, can help you improve services and will also prevent you wasting time on activities or communications that don’t work. Here are some practical tips to help you evaluate what you do and how well you are known.

1. Routinely ask people using your services, attending training, or benefitting from a project to fill in a feedback form. Collate the information from these quarterly and analyse the results. A basic form is provided overleaf that you can use as a template.

2. When people contact you by phone or email ask them how they heard about you – it will give you a picture of how well your communications are working, which channels are best to use, and which you should give up on.

3. Once every two years conduct an awareness survey in your catchment area:- devise a simple questionnaire with up to six questions to assess how much people are aware of the issue you tackle or need you meet, what they think should be done about it, whether they are aware of services in the area (include services offered by your competitors), whether they’re aware of your organisation, what they think it does, whether they recognise the logo.

This doesn’t have to be hugely expensive to do. Recruit volunteers/students to do street surveys and collate the results for you in a spreadsheet which they send back. You’ll then be able to measure how awareness levels increase or decrease every two years.

4. Use your database to measure how many people are attending events, volunteering, or coming to you for help on a regular basis.

5. Keep a cuttings book of all the media coverage you receive, use Google analytics to find out how many people are visiting your website and what they are looking at the most.

6. Keep track of your followers on Social Media and use engaging content to get you more.

Your logo here

**Feedback Form**

Adapt this form to suit your needs – where items are in brackets choose the best option for you – or change if you need to.

**Hello.**

**We hope you have enjoyed your experience with (the xx project from x organisation/with x organisation).**

**Your feedback is important to us so we would greatly appreciate it if you would take five minutes to fill in the form below.**

**Then simply hand it to (the person facilitating your session/our receptionist/the person you worked with today) or email it to (your details here)**

**Thank you.**

**1. About you**

**Name: (optional)**

**Age group:**

**Under 16**

**16-18**

**18-21**

**22-25**

**26-30**

**31-40**

**41-50**

**51-60**

**61 or over**

**Do you work?**

**Employed full time/Employed part time/retired/not working/student/at school/self-employed**

**2. About your experience**

(Ask questions about the service received/ training/event/meeting/open day attended. Remember to ask about the quality of the experience. Ask what was good and what could be improved. Ask if they would repeat the experience or recommend it to others)

**3. About us**

How did you hear about us (tick all that apply)

Article in the media Which paper or magazine?------------------------------------------------------------

Website or blog Which website/blog?-------------------------------------------------------------------

Flyer/poster

Emailing

Our newsletter

Word of mouth

Other (please state)-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**4. Future contact**

If you would like to (go on our mailing list/register for updates/receive regular information about xx) please give us your contact details below)

Name:

Email:

5. Finally, if you have any specific comments you’d like to make about your experience please make them below:-

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Thank you.

**Appendix One: The 7 Ps**

**Appendix Two: Social Media Policy**

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