

Strategic Communications Planning for Non-Profit Organizations: A Data-Based Application of
a Seven Step Model

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Introduction/Purpose

Strategic communication planning is a vital part of numerous successful and efficient organizations, yet it is often times an avoided topic of discussion in other organizations. It is common for businesses to see communication planning as a task that will only be touched upon once immediate, more important jobs are completed and attended to, yet thinking strategically provides a strong framework for businesses to thrive upon. Whether an organization has been in business for twenty years or is just beginning to erect the first office-building wall, strategic communications planning should be seen as an essential building block for success. According to Sally J. Patterson and Janel M. Radtke, the authors of the book *Strategic Communications for Nonprofit Organizations: Seven Steps to Creating a Successful Plan*, the term strategic communications “describes the combination of plans, goals, practices, and tools with which an organization sends consistent messages about its mission, values, and accomplishments” (7). Simply stated, a strategic approach to manage communication is “a plan that makes a direct link between the output of communication and the goals and objectives of the organization” (Bayerlein 6).

From my understanding of the importance of strategic communication planning, my scholarly purpose for this project will be to create an informative packet that will educate organizations, more specifically nonprofit organizations, on how to create a strategic communication plan to help better their business. For those organizations that already have an established communication plan, I hope to provide them with credible data to assess how current and applicable their in-place communication plan is.

First, in part one, I will be providing the reader with an overview of Sally J. Patterson and Janel M. Radtke’s seven step strategic communications planning model. While discussing each

of the steps, I will be providing supporting research from outside peer-reviewed journal articles to support the importance of each element in each of the steps. In part two, I will be applying Patterson and Radtke's seven steps to an actual nonprofit organization in San Luis Obispo County, the San Luis Obispo Farm Bureau. Such will be done in the following manner. I will collect data from the Farm Bureau using fourteen chosen worksheets, from the Patterson and Radtke book, which cover key elements that should be included in a nonprofit's strategic communications plan. From the various elements in the fourteen worksheets, an assessment will be completed (part three) on how the information provided by the Farm Bureau follows the structure and recommendations of Patterson and Radtke's seven step model. The information from the Farm Bureau will be assessed in the following order: steps one, two and three will first be assessed, then steps four, five, six and seven will be assessed. The steps of communication planning truly encompass various areas of the communication discipline; therefore I will be able to include numerous terms, ideas and concepts that I have learned during my undergraduate studies at California Polytechnic State University, San Luis Obispo.

Origins

The seven step strategic communication planning model by Patterson and Radtke was first created in 1993. In the early 90's Radtke, founder and first president of Radiant Communications, Inc. and first executive director of the Center for Strategic Communications, felt compelled to make a "workshop model" to help nonprofit executive coordinators and executives think more critically about how strategic communication could forward their mission. Radtke's company, Radiant Communications, Inc., is "a strategic communications firm, based in Washington D.C., that counsels nonprofit leaders on organizational issues including board development, communications planning, executive coaching and leadership transitions"

(Patterson and Radtke iii). The question to be answered by the model was, “What should every nonprofit executive know about communications in order to leverage his/her work?” (Patterson and Radtke iii) Radtke, along with Patterson and other communication professionals, began crafting worksheets to assist nonprofit organizations in creating their strategic communication plan. According to Patterson, the current president of Radiant Communications, “This book is built on the core principles of the Radiant Communications model—mission driven, audience focused, and action oriented” (iii). Patterson has had more than twenty-five years experience in strategic communications and she has consulted with over seven hundred nonprofit organizations in the area of strategic communication. The goal for Radtke and Patterson’s seven step model was and still is to ensure they give their readers/clients the “very best tools and [strategic planning] expertise” (iii).

Part I

Why Strategic Communication Planning Matters to Nonprofit Organizations

If a nonprofit organization is going to focus on strategic communication planning, they must first know why strategic communications matters. Planning is vital for all organizations, yet even more imperative for nonprofit organizations mainly because they are often charities or service organizations that serve communities and address community issues. Nonprofit organizations also often have a greater need for strategic planning and clear direction because they are driven by their mission statement, goals and target audiences and many are staffed by volunteers who solely seek intangible rewards. Nonprofit organizations do not distribute surplus funds to any individual(s); the organization instead uses those extra funds to further their cause and efforts. Unlike profit organizations that advertise and market products to increase incoming funds, “nonprofit organizations strive to maintain revenues and income streams, as well, but the

communications strategy of a nonprofit organization must be focused on advancing its mission[mission statement] and increasing the community base of support for its work” (Patterson and Radtke 8). The communication challenge for nonprofit organizations is for them to make their mission clear and simple to the community (target audience), so individuals can relate to the mission and the nonprofit’s underlying values. Strategic communications to effectively target messages to target audiences is crucial for a nonprofit organization to flourish.

Benefits of Strategic Communications Planning

Participating in strategic communications planning ensures that all employees, team members, directors, and executives are working for the same objectives and it does so in four main ways. First, strategic communications planning provides an “overarching blueprint” for how all staff members are supposed to approach their positions (Bayerlein 6) and having a clear plan aids organizations in clarifying their future direction. When a strategic plan is put into place within an organization, it gives staff members, and employees alike, the opportunity to potentially approach their work in a new way, “routinely asking, ‘Whom are we trying to reach, what do we want them to do, and how will we know if we have succeeded?’” (Patterson and Radtke 8) Second, strategic communications planning puts a great emphasis on target audiences, why those audiences are important, and what the organization needs from those certain individuals for the organization to stay afloat. By articulating audiences, common objectives and an organization’s mission can be reached.

Third, “When an organization highlights the synergy of communications activity with all aspects of its work, communications staff, program staff, and development staff begin to collaborate and share information in new ways” (Patterson and Radtke 9). This sharing of new information with other staff members creates an ideal environment for group communication to thrive. It is key to have all staff members working together in a cohesive manner, especially

within a nonprofit organization, because such fosters teamwork and improves internal communication. Lastly, through communication planning organizations can utilize limited resources efficiently and effectively, which is especially important for nonprofit organizations. By an organization looking at its external environment and from it creating strategies that will affect a wider range of audiences, “staff members can maximize the opportunity to combine messages and to use certain communication vehicles with multiple audiences” (Patterson and Radtke 9). From strategic communications planning, organizations can save time and money by creating one type of brochure or informative packet that can be sent to numerous sources, while still incorporating effective messages for all recipients. Such a benefit should be the first advantage presented to an organization that is deciding whether or not to develop a strategic communication plan. Cost is one of the main reasons why many organizations fail to develop strategic communication plans, yet savings can and will be seen on an organization’s financial report after working through each step of Patterson and Radtke’s seven step model.

Overview of Patterson and Radtke Seven Step Model

Step 1: Preparing to Plan- Essential Building Blocks

A nonprofit organization must first define its mission by creating a mission statement that conveys, through words, their purpose for being. Patterson and Radtke emphasize the importance of a mission statement by saying, “The strategic plan must be driven by the underlying values and purposes that define the organization” (26). Former National Semiconductor CEO, Gilbert F. Amelio, equates an organization’s success to its mission statement, “To be successful, you must first define success; to reach a goal, you must first define that goal...Every dysfunctional organization I’ve ever studied has shown this lack: the corporate ‘crew’ could not agree, nor clearly articulate the company’s [mission], and individuals could not

even correctly describe the intentions of their immediate boss” (Amelio 115). To ensure an organization has a clearly communicated mission statement, two tasks must be completed during this step of strategic communications planning. Task #1 is for an organization to review their mission statement and ask themselves if it is still applicable to the desires and direction of the organization (Patterson and Radtke 26). Task #2 requires that an organization reviews its programs, goals, objectives, and financial priorities (Patterson and Radtke 28).

Task #1: When looking at an organization’s mission statement it should answer three fundamental questions:

1. What are the opportunities or needs that we need to address? (the *purpose* of the organization)
2. What are we doing to address them? (the *business* of the organization)
3. What ability and experience do we have to meet these needs (the *values* of the organization)

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 27.

Example: Food Bank Coalition of San Luis Obispo

“The Food Bank Coalition is the only countywide source of nutritious food for people in need from San Miguel to Nipomo. Working hand in hand with volunteers, donors and corporate sponsors, and nonprofit agency partners, it’s our mission to see that no one in our county goes hungry” (*San Luis Obispo Farm Bureau*).

- The *purpose* is providing nutritious food for people in need from San Miguel to Nipomo.
- The *business* is working with volunteers and other community members to recruit sponsors to donate funds and nutritious food.
- The *values* are a commitment to the well-being of all needy people in San Luis Obispo County, ensuring no one in need goes hungry, and uniting a community with a common purpose.

Typically a mission statement is 35-40 words, however now organizations are moving to a shorter, more concise statement of 20-25 words (Patterson and Radtke 29). Regardless of word count, a mission statement should be the most important statement an organization gives to the general public. Mission statements are a tremendous marketing tool as well. A nonprofit organization must have a mission statement that audiences will relate to, especially those particular audiences who will be the strongest supporters. An organization's mission statement must be inspiring and meaningful enough to captivate audiences (Levinson, Adkins and Forbes 61). The mission statement of an organization should be displayed prominently, in a high traffic area of the organization's main office because "the mission statement is the foundation of the entire message platform for nonprofit organizations" (Patterson and Radtke 29).

Task #2: A strategic communication plan addresses all areas of a nonprofit organization, from program planning to operational goals. The backbone of a strategic communications plan is created by important documents, such as: "a financial plan, program and operations plans, technology plans for supporting business priorities, development plans—covering both donated funds and earned income, organizational development and human resources plans, and board development plans" (Patterson and Radtke 30). It is vital for an organization to gather the documents above; such documents will aid them in their strategic communications process. Next, an organization needs to review their operational/communication goals and objectives by means of a communication audit. A communication audit can produce excellent information for an organization, especially if an organization is noticing that their communications are not as effective as they should be or need to be.

A communication audit is a "snapshot of an organization's health that helps an organization evaluate if all their brochures, discussion groups, e-mail notifications, twitter

updates, etc. are truly impacting and/or reaching audiences. It helps answers the questions: Are audiences responding to surveys? Why are we only having a 1% response rate? Are audiences reading our blog? Such questions lead organizations to critically think about what communication vehicles they are using, if they are working and where they are placing their time, money, and efforts. The main components of a communications audit generally include:

1. Personal interviews with constituents/members, funders/donors, key stakeholders, etc. to determine if the nonprofit's communications are successfully engaging and informing them
2. A review of existing communications for content, messaging and design effectiveness
3. A review of existing communications vehicles to understand how they meet the needs of the audience
4. A review of existing communications management to ascertain cost effectiveness in the areas of content, editorial review, design and production

Taken from: Patterson and Radtke. "Strategic Communications for Nonprofit Organizations". Wiley: New Jersey, 2009. 34.

A comprehensive communication audit informs the strategic communications plan, it shows areas of weakness, highlights things that are being done well, and points to where improvements can be made. With a comprehensive audit there is a review of all communication policies and an examination of all communication vehicles used by the organization. Karen Vahouny, a founding partner of the Washington, D.C. based communications firm, Qorvis Communications, states that a communication audit answers the questions, "What are your communication strengths and what needs to be improved? Are your messages clearly communicated? Are your media relations efforts helpful? Are your communications linked directly to your organization's goals?" (Vahouny 36). Vahouny also goes on to write, in her article "Get Started on your Communication Audit", that "The research [gathered during the

audit] is followed by a summary, highlighting strengths and weaknesses and recommendations for improvement” (36). Organizations that sincerely seek improvement and put the recommendations into action are those who get their true value out of a communication audit.

Step 2: The Foundation of the Plan- The Situation (External) Analysis

Every organization needs to examine what external environment their organization functions in and around. The purpose of this environmental analysis, “is to help key players within the organization define the playing field and gain information about the forces that will influence the communications plan” (Patterson and Radtke 43). By an organization being aware of potential opportunities and threats, they equip themselves to be prepared for both incoming triumphs and challenges. The environmental “scan” that is completed in this step looks specifically at the macro-environment, which consists of “the broad trends and patterns in the [industry] and outside forces beyond the [nonprofit] organization” (Gallagher 1). This macro-environment analysis examines the general business climate and how that may or may not affect the organization. The five main outside forces that can have positive or negative affect on a nonprofit organization are: demographic forces, economic forces, political forces, technological forces and social forces (Patterson and Radtke 48).

Demographic forces focus on changes that occur in the population that the nonprofit organization is catering to. A surplus of new residents in an area, the aging of residents, or the new statistic that more people are moving to rural areas all can “place new demands on organizational resources, services, and staff and may require a refocusing of the organization’s mission” (Patterson and Radtke 49). When noting demographic forces an organization must know that they are not looking at those individuals solely in their target audience, they need to be looking at the population and demographics in the greater industry as a whole. Economic forces

can pose tremendous challenges for a nonprofit organization that survives on fundraising events, donations and/or annual membership fees, especially during years when the economy is unstable. Obviously most businesses and organizations alike thrive during times of a healthy economy; however it is important to assess what economic trends might affect business activity and to note what things might change in an organization if the economy improves or declines. Political forces affect nonprofit organizations because, “the traditional ‘business’ of nonprofits is increasingly tied to policy making at all levels...and it is easy to see how connected the facts of nonprofits and foundations are to the political environment” (Patterson and Radtke 49). The directors of any nonprofit organization must stay increasingly aware of which political leaders stand for the causes which their organizations are trying to further.

Technological forces have tremendously benefited nonprofit organizations by making various means of communication more economical. Being able to email documents to followers/members enables a nonprofit to avoid printing fees and such uses of technology enable nonprofits to reach more members with less effort and less time. Yet advances in technology occur in other areas than computers and social media outlets. Improvements in technology can be seen with innovative hybrid vehicles, containers and sponges made out of recycled material, etc. Technological forces are not always beneficial to nonprofits, especially those that have older directors and an older target audience who may or may not be comfortable or familiar with newer technologies. Nonprofits who suffer in those areas often times struggle to survive past the lives of their current leadership and current members.

Lastly, social forces can affect nonprofit organizations positively or negatively due to nonprofits focusing on “the human condition—what the public perceives as the critical aspects of human behavior that affect the quality of life” (Patterson and Radtke 49). A large social forces

factor is how individuals and society respond to the notion of volunteering. As stated earlier, many nonprofit organizations are run by volunteers and very few paid employees. Therefore, if committed, reliable volunteers experience a shift in their “social agenda” or they decide they would rather donate their funds rather than their time, such will greatly affect the efforts of a nonprofit organization (Patterson and Radtke 49). Each of the external forces: demographic, economic, political, technological and social, influence nonprofit organizations and “the key is to identify and understand these external forces and to develop appropriate responses to them” (Patterson and Radtke 51). Below are several tips for understanding/relating with the external environment for nonprofit organizations:

1. Stay informed about current affairs through news articles, publications and government reports.
2. Define the broad network of community partners and stakeholders that the nonprofit organization touches/impacts/reaches.
3. Directors should conduct informal discussion groups once or twice a year with people who represent various constituencies or organizational stakeholders: board members, clients, community leaders, activists, etc.
4. Develop a SWOT (Strengths, Weaknesses, Opportunities and Threats) grid to aid the nonprofit organization in seeing the potential opportunities it may have for advancing its mission and goals and also the weaknesses that may hinder such success.

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 50.

Step 3- Focusing the Plan- Target Audiences

According to Patterson and Radtke, target audiences for nonprofit organizations can be categorized into three key groups: *the active public*, *the engaged public* and *the aware public* (65). *The active public* are those individuals who are already crusaders for the cause of a nonprofit organization, they are already involved in the organization and they are the individuals

who actively seek out information, then act upon it (Patterson and Radtke 65). *The engaged public* are those who already know information about the nonprofit organization, most likely have been affected by the nonprofit organization in some way and have worked on some issues, yet they have not yet given their loyalties to the cause. *The engaged public* are the group that will react to a “call to action” (Patterson and Radtke 66). These individuals need to be motivated to act and “the message strategy must be to transform their awareness of the problem” (Patterson and Radtke 66). They need to be influenced; therefore determining ways to gain their support is essential in order for them to become a part of *the engaged public*. *The aware public* are those who already have a passion for the issue/cause of the nonprofit organization and who could potentially be persuaded join to group (Patterson and Radtke 66). However the aware public is more detached than the previous two groups. They are often times not recruited or sought after until *the activist* and *engaged* audiences have successfully collaborated (Patterson and Radtke 66).

If a nonprofit organization can truly identify and understand their target audiences, they will be able to effectively reach the greatest number of people, using the least amount of resources. Most nonprofit organizations have numerous target audiences which creates a need for the nonprofit to understand the motivations of each audience group. According to Patterson and Radtke, “The more narrowly an organization defines its audiences and the better it understands them, the more likely it can craft messages that will reach and motivate those audiences to take positive action” (65). The more specific an organization is when defining their target audiences, the more successful they will be at communicating and working together with them. However an organization must be cautious to state that they understand their target

audience, because there is a tremendous difference between *knowing* and *understanding* targeting individuals.

In order for a nonprofit organization to have a complete understanding of their target audiences, the organization must learn all about the individuals in their particular audience groups. The executives of nonprofit organizations must stand in the shoes of their audience members (Patterson and Radtke 68). Jay Waters is a chief strategy officer at Luckie and Co., a full service advertisement agency in Alabama which has clients such as Papa John's International, strongly supports the statement, "It is not about you" when referring to how executives target and come to understand their audiences (25). Nonprofit organization leaders must consider not only how to reach target audiences, but also how to relate to their ideologies and point of view. Executives need to do more than just identify key audiences; they must veer away from assumptions pertaining to their audiences and truly come to understand the feelings and preferences of those audience members. Waters believes, "a traditional target audience description does not help us understand anything about the target or the task. Describing gives us a snapshot, but defining gives us an insight. What we need is a target audience definition" (Waters 25). When target audiences are defined and fully understood, strategic communications planning can then begin. Below are four tips for targeting key audiences:

- 1.** Carefully consider which segments of the target audiences are most connected to the nonprofit organization's mission and values, avoid attempting to reach the general public.
- 2.** Establish priorities among the audiences, from researching and defining each key target audience separately.
- 3.** Cluster audiences into groups according to their values, connection to the organization and what desired action is needed from them.
- 4.** Be sure to note that there are many organizations competing for the attention audiences. By understanding key audiences and knowing what is important to them, the organization can maintain a stronger connection with their audience.

Step 4- Fostering Audience Support- Communications Objectives

Fostering audience support through communication goals and objectives brings about proper strategic communications planning. Communication goals, “indicate what is hoped to be achieved through a particular behavior” and “goals have to do with change and are therefore often associated with effects” (Wippersberg 64). Once goals are created or contrived, it is necessary to make more specific objectives for those goals. Each goal should have two to three specific objectives in order for achievement of those goals to be attainable and measurable. The principal difference between goals and objectives is that, “an objective is a precise, measurable result that contributes to the achievement of the goal” (Patterson and Radtke 77). Specific communication objectives assist a nonprofit organization in targeting what audience needs to be reached and objectives list out, in great detail, how those individuals will be reached and in what time frame they will be reached. Below are numerous terms and questions that are often used when discussing communications objectives:

- 1. Project goals** (What does the organization want to make happen?)
- 2. Process objectives**—action the organization takes (What does the organization intend to make happen?)
- 3. Outcome objectives**—results that the organization seeks to achieve with the people it serves (What does the organization want others to do?)
- 4. Communication objectives**—action the organization needs from others (Who needs to be reached, how and when will this happen?)

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 78.

The most important word, when discussing communications objectives, is measurable. Measurable objectives help organizations evaluate the effectiveness of their efforts and they assist organizations in measuring how well they are achieving their desired goals. Each

measurable objective should have a realistic target date (Patterson and Radtke 78). A target date or time frame gives an organization that additional motivation it may need to complete/meet a certain objective. According to an article in Communication World, entitled “Communication ROI”, “It is [necessary] to define meaningful metrics to benchmark communication activities and assess performance against tactical and strategic objectives. Benchmarks should include monthly, quarterly and yearly analysis of outputs and outcomes” (Woods 16). To ensure a nonprofit organization’s communications objectives are measurable and specific, “indicate the targeted audience, area of change, direction of the change, degree of change desired and time frame or target date” (Patterson and Radtke 79). In addition to target dates and benchmarks, communications objectives often times change over time and as particular objectives are achieved new objectives are created. This new creation of objectives furthers the achievement of the overarching goal.

To ensure communications objectives are clearly defined and assessable, nonprofit organizations should apply the SMART test formula to each of its communications objectives. The SMART test asks, “Is the objective Specific, Measurable, Achievable, Realistic and Time Bound?” (Patterson and Radtke 80) Specific objectives are those that were mentioned above: identifying target audiences, what type of change is desired and in what time frame. Specific communication objectives “should be as concrete as possible” (Wippersberg 57). Measurable objectives allow organizations to know if the desired objective is feasible and measurement helps monitor if the objective is met. Achievable objectives focus on whether or not the nonprofit organization, as a whole, has given approval to the objective and if they agree there are adequate resources to achieve the objective. When looking at Realistic objectives, the organization must strongly consider whether the objective can be achieved, if not, the objective is rather a lofty

idea. The SMART test does not try to create negativity with regards to Realistic communications objectives, yet it drives nonprofit organizations to look at the entire picture, “in other words, in the desired time frame,[can] the organization do the necessary work (develop the materials, disseminate the materials, recruit participants, etc.)” (Patterson and Radtke 81). As mentioned above, Time-bound objectives are vital for an organization because they provide benchmarks for achieving and measuring success. Any organization, “can begin a measurement program immediately by identifying the objectives that management cares most about and finding ways to tie communication goals to these objectives. The first step is to make a commitment to measurement” (Woods 18).

Step 5- Promoting the Nonprofit Organization- Issue Frames and Message Development

Message development is the process of transforming sound bites, words and phrases into sentences that are effective and express a complete thought (Patterson and Radtke 87). A nonprofit organization gains members, followers, volunteers, etc. when they carefully craft powerful, compelling messages that motivate audiences with a call to action. Message development involves looking at many different elements: image, mission statement, organization descriptions, messages, message platforms, slogans and the framing of messages (Patterson and Radtke 88). One of the more important terms is message framing.

Message framing is a process used to study the ideals, previous values and emotions that some may associate with an issue (Patterson and Radtke 88). The process, “refers to both the way the public views issues and the values and assumptions that reinforce those views” (Patterson and Radtke 88). From knowing how an audience may feel about an existing issue, an organization can “frame” or “craft” a message that will either follow along with the current feelings of the audience or attempt to change the current viewpoint of the audience. Holly

Minch, the Director of the SPIN Project, a nonprofit consulting firm assisting groups nationwide with strategic communications support, states in her article, “Considerations at the Intersection: Community Organizing and Strategic Communications”, that “in our view, strategic communications is an art—the art of presenting ideas [messages] clearly, concisely, persuasively and systematically in a timely matter to the right people” (72). Mrs. Minch goes on to also note, “framing and developing messages...can reveal fundamental considerations in strategy and organizational identity” (72). Knowing target audiences, as discussed in step three, allows nonprofit organizations to develop messages that will resonate with particular individuals. Taking the time to carefully compose messages is critical for a nonprofit organization and such cannot be stated enough. According to Patterson and Radtke, “message development is not linear, and there is no one right way to develop effective messages...[yet] in developing messages, it is important to know who needs to be reached” (89). The four steps in the message development process are in the box below and will be expanded upon in the paragraphs to follow:

1. Identify three of four key themes
2. Decide on the message frame
3. Create an overall organization description or “umbrella message” for the organization
4. Develop persuasive messages targeted to the priority audience using the message triangle

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 89.

When identifying key themes, an organization must articulate three to four themes to be the basis for their messages. These key themes should reflect major strengths, vulnerabilities or opportunities and they should “provide the emotional grist that best responds to challenges,

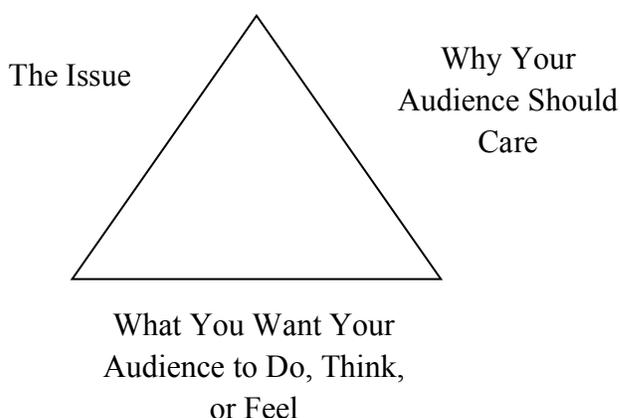
arguments or questions that may arise for the organization” (Patterson and Radtke 89). Deciding on the message frame requires a nonprofit organization to decipher how they want audiences to “understand and relate to their mission, its programs, and its issues” (Patterson and Radtke 90). However, regardless of how a nonprofit organization frames their messages, the media plays a significant role in how issues/messages are distorted or changed when presented to public audiences. The solution to keeping the media from altering or reframing messages is to understand the media. According to Patterson and Radtke, communication strategies must be developed in the frames that are “used in popular discourse, [if not] the organization may fail to connect with the public and lose opportunities to attract the attention” (91).

The article, “Framing, Agenda Setting, and Priming: The Evolution of Three Media Effects Models” in the Journal of Communication, upholds the notion that the media does not intend to distort messages, by stating, “Frames, in other words, become invaluable tools for presenting relatively complex issues, such as stem cell research, efficiently and in a way that makes them accessible to lay audiences because they play to existing cognitive schemas” (Scheufele 12). From understanding the media and how it functions, a nonprofit can craft their messages accordingly, to be most effective. For example, nonprofits should frame issues in a way “that builds a common public understanding of a problem and its causes” and in a way that gives individuals the sense that their work “can advance the desired solution” (Patterson and Radtke 92).

Creating an overall description or “umbrella message” for a nonprofit organization aids the organization in having a consistent message about its mission and work (Patterson and Radtke 100). The 20-25 word description should be known by all who work or volunteer at the nonprofit organization, enabling the same message to be presented to all audiences. When

creating an organization description, nonprofit organizations need to recognize what words should be avoided in the description and what words should be highlighted. Words have the ability to change meaning over time and “one word has the power to offend, to enlighten or to disgust” (Patterson and Radtke 99). Organization descriptions differ from an organization’s mission statement mainly in the way each is written. A mission statement is often times a more formal statement that may not “translate well into the spoken word” (Patterson and Radtke 99). An organization description is stated after an employee or volunteer is asked about their place of work or what the nonprofit organization they work for does. It creates a common language description for all to verbalize and comprehend.

The last step in the message development process is developing persuasive messages using the message triangle. The message triangle was created to help nonprofit organizations create persuasive messages to attract target audiences. The triangle has three legs: the issue, why your audience should care, and what you want your audience to do, think, or feel (Patterson and Radtke 102). The message triangle is below:



Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 102.

Defining the issue/problem is crucial and when doing so, a nonprofit organization must have their target audience in mind. The particular issue facing the nonprofit organization, with regards to the triangle, should be issues that the nonprofit is either currently fighting or are

continuously fighting (the mission of the nonprofit). Specifying why your audience should care is pivotal when gaining and retaining members. It is important to pose the questions, “Why should our target audiences care about our mission?” and “Why would our mission matter to them?” Explaining what you want your audience to do, think, or feel “should ask audience members to make a specific commitment to the issue or commit to a specific action” (Patterson and Radtke 103). Giving target audiences motivation becomes a large part of this third leg. A feeling, interest, and/or excitement must be created within the target individuals. Effective message development requires an organization to carefully consider the audience and above all must be “mission driven, audience focused, and action oriented” (Patterson and Radtke 101).

Step 6- Advancing the Plan- Vehicles and Dissemination Strategies

Each communication strategy used by a nonprofit organization enables them to reach certain audiences at certain times. Communication vehicles, such as email, e-newsletters, magazines, websites, advertisements, social media outlets, etc., facilitate a nonprofit’s dissemination strategies. Knowing what strategies work best for particular target audiences aids nonprofit organizations in reaching the largest number of individuals with their limited resources. Patterson and Radtke highlight seven criteria to determine “the appropriateness of different strategies with different audiences” (113). They are listed below:

1. Audience responsiveness
2. The organization’s relationship to the audience
3. How the strategy or vehicle will influence the audience’s perception
4. Controlling the message
5. Effort to implement
6. Budget issues
7. Potential uses with other audiences

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 113.

A nonprofit organization may consider one of the criteria more important than another at a certain time, however each of the seven criteria will influence the organization's dissemination strategies at some point.

Audiences have been discussed in nearly every step of the Patterson and Radtke model, yet in this step it is important to know how different communication vehicles and strategies will affect audiences during their day-to-day lives/activities (Patterson and Radtke 114). For example, email, social media outlets, such as Facebook, and blogging may be the most effective way to reach target audiences who work in an office or are at home during the day. The questions for nonprofit organizations to ask themselves regarding audience responsiveness are, "What communication vehicles are they likely to encounter" and "Of those, which are likely to influence them?" (Patterson and Radtke 114)

The nonprofit organization's relationship to the audience and how the vehicles used will influence audiences are two criteria that correlate with each other. With both, the organization must think critically about two things: who the will messages are directed towards and how those messages are being delivered. The dispersing of unsolicited communications will most likely be ignored, because the audience has absolutely no connection to the organization attempting to reach or contact them. When a nonprofit organization uses the press or a third party messenger to reach audiences, "[the organization] must consider not only its relationship to that third party (who also comprises an audience) but also the relationship of that messenger to the primary target audience" (Patterson and Radtke 114). The involvement of a third party also causes alarm due to the way they may frame issues or messages. Audience perception determines what type of approach a nonprofit organization should use. Particular audiences may be influenced by a more rational approach, while other audiences may be influenced by a more emotional approach

(Patterson and Radtke 115). Helpful questions for knowing how different strategies or vehicles will influence audience perceptions are, “Will this particular audience be moved by a more rational approach to the issue or by a more emotional telling of the message?” and “Does this audience need more direct experience of the problem to feel more connected to it?” (Patterson and Radtke 116).

Controlling of messages is done by both the creator of the message and those recipients that receive the message, yet at times having complete control may be impossible. There are two instances when the controlling of messages becomes difficult. The first is when a free-lance writer is brought in to help an organization compose articles and publications (Patterson and Radtke 116). Even though the hired individuals may desire to be the voice of the organization, their work, “may not [be] in the same voice as the in-house staff” (Patterson and Radtke 116). The second is how audiences receive/construe the messages delivered to them. Although a nonprofit organization cannot control or alter the mindset or values of audiences receiving their messages, the nonprofit organizations can research their audience and take strides to understand their audiences (Patterson and Radtke 117). Such has been mentioned in steps three, four, five and now six—nonprofit organizations must attempt to understand the viewpoints, values, and points of view of their target audiences. Questions to be raised to help nonprofit organizations with message controlling are, “Which vehicles does the nonprofit currently produce that clearly reflect the voice of the organization? and “What can the organization do to help ensure that the target audiences interpret the message accurately?” (Patterson and Radtke 117)

The last three criteria for determining proper dissemination strategies are effort to implement, budget issues and potential uses with other audiences. Each has two common ties that make them overlap— 1.) Are the strategies realistic? and 2.) Are they cost effective?

(Patterson and Radtke 118) Nonprofit organizations must take into account how complex and difficult implementing a new communication vehicle may become. For example, manpower and monetary funds should be considered first if a nonprofit organization is going to consider implementing a monthly or bi-monthly newsletter. All elements of the new venture need to be analyzed—the deadlines, printing costs, mailing costs, increase of staff working hours, etc. Patterson and Radtke support the facts that, “most of the more successful nonprofits, large and small, work with a communication budget that is 8% to 12% of their total organization budget” (118). As nonprofit organizations assess their communication costs, it is important to recognize, as has been stated in previous steps, that some communication dissemination strategies can be used for more than one target audience. Strategically creating a publication or newsletter that can be sent to more than one audience can save an organization time and money (Patterson and Radtke 119). Insightful questions to assist organizations in achieving the last three criteria are, “How much time will it take for staff to produce this vehicle”, “Is there a way to relocate existing resources to realize a bigger bang for the buck”, and “Can writers easily tailor the headline and first paragraph to better address another audience group?” (Patterson and Radtke 118 & 119).

Once a nonprofit understands the criteria for selecting communication strategies and vehicles, it must then focus on using those strategies and vehicles to meet communications objectives. Patterson and Radtke list several vehicles typically used by nonprofit organizations: face-to-face meetings, print, electronic communications, audio vehicles, video, and websites (127). Electronic communications has an advantage over many other vehicles simply because it is delivered instantly to the receiver (Patterson and Radtke 133). According to Jay Conrad Levinson, Frank Adkins and Chris Forbes, the authors of *Guerrilla Marketing for Nonprofits*,

“Office software and e-mail marketing services allow you to name-merge your messages to the people on your email lists and people [audiences] love the sound and sight of their own name” (118). When using electronic communications, nonprofit organizations must remember the little details. Be sure to make an inviting subject for the e-mail, be sure to sign all e-mails with a “signature,” avoid sending too many e-mails—no more than one every two weeks (Patterson and Radtke 135). It is important for an organization to do everything it can to ensure receivers feel the e-mail was specifically designed for them.

The emergence of social media outlets has also created a remarkably valuable communication vehicle to reach audiences of all ages in an extremely timely manner. Only the nonprofit organization can decide if it is ready to use social media outlets, such as blogging, podcasting, YouTube.com, Facebook.com, Twitter.com, LinkedIn.com, VolunteerMatch.com, and widgets. Yet the authors of *Guerrilla Marketing for Nonprofits*, state, “With little time, energy, and imagination nonprofit guerillas deepen relationships with their clients and supports and increase the frequency of exposure of their message to the people they want to reach by using social media” (195). The statistics presented in the 2010 book *Guerrilla Marketing for Nonprofits*, argues that contrary to what many believe, Facebook.com is not only used by older individuals. The largest group of individuals (43%) on Facebook.com are 18-25, however one-fourth of users are over 35, and women over the age of 55 are rapidly becoming users (Levinson, Adkins, and Forbes 196 & 197). Embracing the various outlets of social media may be something that many nonprofit organizations chose to do and such might become the determining factor of what nonprofit organizations succeed in the 21st century.

Step 7- Ensuring that the Plan Succeeds- Measurement and Evaluation

Performance evaluation is a vital part of step seven and according to Patterson and Radtke, “if you don’t define your successes, others will discuss your failures” (151). Evaluation should take place while creating the strategic communications plan and continuously after the planning is complete. It is important for a nonprofit organization to evaluate current communication processes, their mission statement, goals and objectives, target audiences, etc. Julie Wippersberg of the Department of Communication at the University of Vienna, Austria, contends that the nature of evaluation consists of three main aspects: “1.) analysis: measurement and observation, 2.) assessment of results, and 3.) steering and feedback” (62). Evaluation also gives a nonprofit organization an opportunity to make needed changes to help the organization grow and continue to succeed in the future. The various concepts that were detailed in steps one through six above, have laid the stepping-stones for a nonprofit organization to begin a performance evaluation. Below are the concepts that have driven the strategic communications planning process thus far and they are also the areas where evaluation and feedback should be given.

1. Cycle of Communications
2. Framing issues in concert with public understanding
3. SMART communications objectives/ Communications Impact
4. Targeted audiences
5. Strategies that support the communications objectives
6. Message discipline

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations”. Wiley: New Jersey, 2009. 152-153.

Various evaluation tools can be used by a nonprofit organization to measure current strategies and receive feedback on what improvements can be made. Patterson and Radtke present three evaluation tools that a nonprofit organization could benefit from: focus groups, newspaper/publication clippings and analysis, and sample surveys (156). All have the potential

to provide the organization with pertinent information to make improvement upon, yet the most useful may be a survey evaluation. Although in the past, surveys dispersed from organizations have not had the greatest return rate, now with online survey companies, such as Survey Monkey, organizations can simply attach a survey onto their monthly newsletter or their website for audiences to complete. All the results are compiled electronically and emailed back to the creator of the survey. Such advances in technology have made it simpler to receive feedback from audiences. The only drawback may be the particular individuals who partake in the survey. Audiences who are already active within the nonprofit organization and who open emails and visit the website regularly, may be the same individuals who complete the survey. Honest feedback should come from those who are not avid researchers and participants in the nonprofit organization, because those are the individuals you want to motivate to join.

Part II

See Appendix A for the 14 completed worksheets from the San Luis Obispo Farm Bureau.

Part III

General Information about the Assessment Process and Worksheets

The following pages will include a review/assessment of the current communication strategies at the San Luis Obispo Farm Bureau (SLO Farm Bureau). Within the Patterson and Radtke book, *Strategic Communications for Nonprofit Organizations: Seven Steps to Creating a Successful Plan*, the authors include numerous worksheets, specific to each step, to assist a nonprofit organization in creating an effective strategic communications plan. In the book, each one of the chapters outlines basic principles and gives the reader the needed guidance to complete each step of the communications planning process, such is detailed in part one of this paper. One to four blank worksheets follows each step/chapter, such can be seen in Appendix A,

and the worksheets are truly the building blocks for the process. For this project I chose to use one-two worksheets for each step. From there I chose to apply the worksheets to the SLO Farm Bureau located in San Luis Obispo. I met with the Executive Director of the SLO Farm Bureau four times and during each meeting we worked through different worksheets. All the information written on the worksheets, in Appendix A, comes from verbatim responses I received from the Executive Director and Office Manager. The review/assessment will be completed by comparing the data given to me from the SLO Farm Bureau, against how the Patterson and Radtke model/book state each step/building block should look.

The review/assessment will pinpoint specific challenges the SLO Farm Bureau is facing, highlight the strengths and areas of weakness the SLO Farm Bureau is experiencing with their current strategic communications, and in the end, the assessment will give feedback that will improve the communication practices and help further advance the mission of the SLO Farm Bureau. By using the Patterson and Radtke model to assess/make recommendations to the SLO Farm Bureau, I will be doing a significant service to the nonprofit organization. I will be discussing the initial key areas for improving strategic communications, yet there will be additional worksheets included in Appendix A to be acted upon subsequent to my specific project. The recommendations noted in the following pages will aid the SLO Farm Bureau in their progression towards thinking of their own communication in a systematic way. The SLO Farm Bureau should thoroughly consider the Patterson and Radtke model, the collected data, and the assessment/recommendations below to ensure they are effectively and strategically achieving their mission and program goals.

Why I Chose to Complete a Strategic Communication Assessment with the San Luis Obispo Farm Bureau

During my third year at Cal Poly, I interned for the SLO Farm Bureau from January 2010 to June 2010 and from working in the office I saw a great need for a strategic communications plan. Although I was only in the office five to ten hours per week, I saw a need for more up-to-date goals and communication strategies. The need was there, yet I also saw a willingness to grow within the office. In the middle of my fourth month, the SLO Farm Bureau decided to go somewhat paperless by emailing updates and newsletters out to members, instead of mailing hard copies every month. It was then when I saw the potential in the SLO Farm Bureau and it was also then when I truly learned their main struggle: their members are older individuals who are sensitive to change and are not knowledgeable about newer communication technologies. The change to email newsletters was successful and now the SLO Farm Bureau has two new communication vehicles to reach their young and old members. There are still certain individuals who personally come into the office to get their updates, however the majority have adjusted exceedingly well. Branching from that progress, I chose to use the SLO Farm Bureau for this communications strategy assessment to give them the tools and knowledge to grow even more. Initially I was drawn to the SLO Farm Bureau from my love for agriculture, however from using them for the application process of my project, I have aided them and they have reciprocated the favor.

Background Information about the San Luis Obispo Farm Bureau

The SLO Farm Bureau formed in 1922 and is one of 53 County Farm Bureaus within the state of California (“About the Farm Bureau”). The greater California Farm Bureau Federation is a non-governmental, nonprofit, voluntary membership corporation whose “purpose is to protect and promote agricultural interests throughout the state of California and to find solutions to the problems of farm, the farm home and the rural community” (“About Farm Bureau”). The

California Farm Bureau represents farmers and ranchers in policy hearings and educates its members on all issues that may affect individuals in agriculture. Currently the SLO Farm Bureau employs two full time employees, one part-time employee, and they hope to hire an additional part-time employee in the near future. The SLO Farm Bureau also contracts a bookkeeper and an editor/website designer. The nonprofit organization has 1,526 paying members (899 Agricultural members and 637 Associate members). With the funds brought in from membership fees, rental income and business supporters, the SLO Farm Bureau's Executive Director, along with the Board of Directors (the Board), fight issues for farmers and ranchers and they help protect agriculture along the Central Coast.

Assessment of Overall Readiness for Strategic Communications Worksheet

Worksheet #1 assists the SLO Farm Bureau in determining what exactly their communication needs are and where they should focus the most energy during their strategic communications planning process. It is the first of 14 worksheets and it gives the nonprofit organization and me a basis for further data collection. From the results of the worksheet, it was found that the SLO Farm Bureau does not have a clear strategic vision or a strategic communications plan. The SLO Farm Bureau believes they have a clear, concise mission statement, yet their current communications need more work in order for it to be effectively furthering their mission. They feel confident that they know their priority audiences, that they are reaching them, and that their members know what is wanted of them. They believe their current messages are clear and ultimately motivate members. They believe their current communication vehicles need more work to have the maximum communications impact and that they need a more efficient and consistent way to watch and evaluate their current communications work. Each of these specific areas will be discussed/assessed and

recommendations, based on the Patterson and Radtke model, will be presented in greater detail in the pages below.

Assessment of Steps One, Two and Three Completed Worksheets

Task one in step one, required the SLO Farm Bureau to review their mission statement, therefore Worksheet #2 focused on the mission statement and goals. The San Luis Obispo Farm Bureau does have a mission statement; however, it does not answer the three questions detailed by the Patterson and Radtke model. Their current mission statement is as follows, “To lead San Luis Obispo County in the protection, promotion, and advocacy of agriculture for the benefit of our members and community”. It does state the *purpose* of the organization- “To lead the county in the protection, promotion, and advocacy of agriculture”, which answers question one. It does answer question three by stating the values of the organization, yet the mission statement falters by failing to answer question two, “What are we doing to address them?” (Patterson and Radtke 27)

From the information gathered during my interviews with the SLO Farm Bureau, their mission statement should emphasize how they educate their members to become active in agricultural policy making. Their mission statement should include how they provide education on agricultural policies to ensure their members become advocates to protect the well-being and longevity of agriculture. According to Patterson and Radtke, more recently organizations have begun to make their mission statements shorter, keeping it no more than 20-25 words, however the SLO Farm Bureau might need to make their mission statement a bit longer (29). Adding an additional sentence to discuss the *business* of the SLO Farm Bureau would tremendously strengthen the mission statement and would create a more encompassing foundation for the nonprofit organization. Strategic communications is rooted in a nonprofit organization’s mission

statement; therefore, a great amount of time and effort should be put into the formation and re-crafting of the mission statement.

Task two in step one, requires the nonprofit organization to review all program plans, goals, and objectives. On Worksheet #2, the SLO Farm Bureau wrote out their current program goals and supporting objectives in order for the organization to see how well they are achieving, following, and succeeding in their goals. Although goals and objectives are discussed heavily in step four, and will be in pages to come, Worksheet #2 required the SLO Farm Bureau to articulate their organizational goals. According to Patterson and Radtke, such is a very important step for the purposes of the collecting documents to review for the strategic communications planning process to begin. A startling fact that I encountered, during my first interview with the SLO Farm Bureau, was that they had not reviewed and/or edited their organizational goals and objectives since their November 2008 Strategic Committee meeting. On Worksheet #2, included in Appendix A, check marks were placed next to each objective that the SLO Farm Bureau felt they had accomplished or they are currently accomplishing. Out of their six goals and thirty additional objectives, only eleven objectives have check marks beside them. Such was a strong indicator that the SLO Farm Bureau is not directly accomplishing their set goals and supporting objectives. Patterson and Radtke strongly suggest in step one of their model that nonprofit organizations should routinely review their goals, objectives, plans, and mission statement to ensure all are current and are still applicable to the nonprofit organization.

The SLO Farm Bureau is achieving their first goal of addressing critical issues to ensure the sustainability of agriculture. The three objectives listed below that goal are all currently being done; however, this is only the case with the first goal. The second goal and its supporting objectives are not being achieved. For instance, the President's Club is no longer done, which

makes the objective out dated and the Rental Property Committee is not being able to fully educate the Board on the rental property situation, due to the Board being very resistant. The third goal focuses on enhancing membership and its value; however, with the limited amount of staff, the SLO Farm Bureau is unable to place large amounts of time and energy into achieving the particular goal and objectives. However, with additional money in the new budget, the SLO Farm Bureau should be able to hire a part-time employee to focus solely on membership and social media outlets.

The fourth goal outlines how the SLO Farm Bureau would like to communicate with and educate policy makers, the media, and others about the importance of agriculture on the Central Coast. Yet, according to the Executive Director, only three of the eight corresponding objectives are being done or have been done. The Political Endorsement Committee meeting has completely stopped and the creation of an informative PowerPoint about the SLO Farm Bureau has yet to happen. On a positive note, the Executive Director has taken advantage of numerous public speaking opportunities to promote and educate others about agriculture and an Ag Directory has been created. Great strides have been made with regards to goals five and six. The SLO Farm Bureau has built strong relationships with members of the Central Coast community, especially the San Luis Obispo Chamber of Commerce. Local businesses support the SLO Farm Bureau both in attendance at events and financially. Communication has become more streamlined between the Board and key members and the structure of their committee system is currently being enhanced. The review of the SLO Farm Bureau's operational/communication goals and objectives had praiseworthy points and areas where improvement is needed. With bringing forth these goals, such led the SLO Farm Bureau into Worksheet #3, a quick communication audit.

Worksheet #3 summarizes findings and acts as a concrete way to visually see what communication is working within the SLO Farm Bureau and what communication is not working. The results of this mini-communication audit articulate clearly the areas where improvement is needed. The Worksheet provided choices for the SLO Farm Bureau for them to decide if certain means of communication are effective or not effective, on a one to five scale. The SLO Farm Bureau ranked only three of their communication policies as “not effective,” however others were very close to being ranked in this way. The other communication policies that were ranked as “effective” were that the SLO Farm Bureau felt they had an effective: a.) clear mission, goals, and strategic plan, b.) strong brand and design identity, c.) clear messages and language platform, d.) clear, consistent logo, images and visuals, and h.) clearly identified audiences including their information needs.

According to the elements for strategic communications planning by the Patterson and Radtke model, the SLO Farm Bureau does have a mission statement and goals, but the question is whether or not they are necessarily *effective*. As stated above, the mission statement and goals need to be improved and refurbished to be more detailed. The SLO Farm Bureau does not have a clear strategic communications plan; therefore, that communications policy cannot even be ranked without it existing. It is also important to note the communication policies that were ranked as “not effective”: e.) effective media relations plan, f.) strong website, and g.) effective membership/outreach strategy. The SLO Farm Bureau does not have an effective media relations plan and such was brought to attention when reviewing their organizational goals. The effectiveness of a media relations plan was a question that was even raised by Karen Vahouny, in part one of my project. Keeping the lines of communication open with the media and clearly

communicating messages to the media can give way to creating a tremendous amount of interest from potential new members.

The website is something that the Executive Director wants to improve, by making it more user-friendly. With regards to the area of membership, it is not receiving large amounts of attention due to the absence of manpower and financial reasons. However, the SLO Farm Bureau should be praised for their strong brand, consistent logo, and clearly identified audiences. The SLO Farm Bureau possesses a strong brand and logo because it is a part of the larger, California Farm Bureau Federation. With that strong recognition and support, the SLO Farm Bureau is able to reap many benefits, in the area of effective communications, which other nonprofit organizations do not.

Looking at the communication practices, on the communication audit Worksheet #3, the SLO Farm Bureau feels that all their practices fall under “effective” and many were ranked with the numerical value of five. From talking with them, I would have to agree that many of their general communications practices are very effective. The last section of the mini-communication audit looks at communications capacity/production. The SLO Farm Bureau ranked all four areas as being “effective,” however, one area that was brought to my attention, was the area of: a.) experienced and reliable staff. The staff at the SLO Farm Bureau is extremely experienced and reliable in all areas except for the area of technology. The Executive Director discussed with me that she needs to be trained more on website design and on the new social media outlets. One of the factors inhibiting the growth of the SLO Farm Bureau is their lack of participation in newer technological advances, such as an updated website, Facebook.com, Twitter.com and other social media sources.

As a whole, the mini-communication audit did shed light into numerous areas where improvements can be made. The most important fact for the SLO Farm Bureau to note is that reviewing and updating is crucial to future success. According to Patterson and Radtke, “A communications audit should be conducted routinely every five to seven years, simply to ensure that the organization is staying current with trends, changing language, new communication vehicles and techniques and to upgrade design elements” (32). In addition to completing Worksheet #3, there is an entire methodology for conducting a communications audit, which I believe would be very helpful to the SLO Farm Bureau. Patterson and Radtke lay out five tasks for a nonprofit organization to follow when taking part in a proper and comprehensive communication audit. The tasks are as follows: plan the audit, conduct interviews, collect inventories and analysis, present findings, and conduct additional research, if needed (Patterson and Radtke 34). The key to the entire strategic communications planning process is for the nonprofit organization to be more strategic, efficient, and effective. All the worksheets are designed to pinpoint what the SLO Farm Bureau is doing right and what needs improvement and/or change.

Worksheets #4, #5, and #6 all examine the external environment that the organization is functioning in and around. The Step two worksheets focus solely on the idea of an environment “scan”, by specifically looking at the macro-environment of a nonprofit organization (Gallagher 1). Worksheets #4, #5, and #6 all work in collaboration to expel detailed, useful data about the SLO Farm Bureau’s macro-environment and the findings were very insightful. When looking at the demographics and shifts or changes in the primary populations/communities that the SLO Farm Bureau serves, the aging members/populations are indeed a large concern. According to the Executive Director, during the past three years, the SLO Farm Bureau has experienced

declines in their memberships as their members literally die off. Such is a cause for alarm, yet I was pleased to hear about all the strides that the greater California Farm Bureau and SLO Farm Bureau are taking to begin targeting younger audiences, however much more needs to be done. In the past year, the California Farm Bureau has created a collegiate membership category and regular membership categories have changed at the state level as well. The two main memberships available through the Farm Bureau used to be Voting and Sustaining memberships, now there are two different types of memberships with the Farm Bureau. Members can join one of two groups, Agricultural members or Associate members. Agricultural members are those individuals who are directly involved in agriculture, e.g., farmers, ranchers or people who own some type of property or farming business. Associate members are those individuals who want the social aspect of being a SLO Farm Bureau member, yet the main incentive for them is receiving the *San Luis Obispo Country* publications from the SLO Farm Bureau. By beginning to target a more diverse demographic, the SLO Farm Bureau can gain additional members.

The additional areas for membership growth must start at either the collegiate level or with personal contact with the sons or daughters running the family farm, ranch, etc. The SLO Farm Bureau has a group called Young Farmers and Ranchers that has a presence on the Cal Poly campus; however, only a selected few are reached. If the SLO Farm Bureau is able to hire another part-time staff member, they should try to get their foot into more Cal Poly College of Agriculture classes. If a general PowerPoint was made about the SLO Farm Bureau and all the programs and groups it offers, as stated in the earlier goals, then any volunteer or paid employee could bring the presentation to classes, various club meetings, and other Cal Poly events. Education about what the SLO Farm Bureau does and how it functions would be a tremendous stepping stone for spreading word about the nonprofit organization. With such activities and

outreach programs it is often hard to evaluate/know if the time and energy was worthwhile; however, tracking the number of new members and inquiring phone calls could indicate the impact of the presentations.

Another outside force that could potentially have a great effect on the SLO Farm Bureau is the external factor of technological developments. Worksheet #4 asked the SLO Farm Bureau a four part question about technological developments. The SLO Farm Bureau said that they thought advancements in social media marketing could definitely benefit the organization, yet no steps in that direction have been taken at the moment. However, they have taken steps with regards to e-newsletters and notifications. Currently “Notes From Farm Bureau” and “Ag Update” are two e-newsletters that are sent out to selected individuals. “Notes From Farm Bureau” is sent strictly to Agricultural members and “Ag Update” is sent to all Agricultural members, Associate members, and special guests and it is posted on the SLO Farm Bureau website. Through “Notes From Farm Bureau” and “Ag Update” the Executive Director is able to see how many people are opening the newsletter, what individuals are opening it, and which parts of the e-newsletter are being opened and read. All of the tracking is done through the program Constant Contact, and such has been a tremendous stepping-stone for the SLO Farm Bureau. A low point for the SLO Farm Bureau is that they are not taking part in the social media craze and they should be using this remarkable means of communication. Messages and information posted on social media sites spread incredibly fast and no nonprofit organization should neglect such a powerful tool. The SLO Farm Bureau wants to gain younger members; however, they will not achieve this goal if newer media is not used to reach and recruit these potential new members.

Strategically placing messages on popular media sites such as Facebook.com, Twitter.com, widgets, etc. could help the SLO Farm Bureau with how they respond to their target audiences. As quoted earlier, Patterson and Radtke stated in the chapter about step two, “the key is to identify and understand these external forces and to develop appropriate responses towards them” (51). Developing ways to use social media marketing could advance the mission of the SLO Farm Bureau in many ways. The book *Guerrilla Marketing for Nonprofits* lists nine ways to master nonprofit social media: craft a message that will make audiences act, find the ideal virtual meeting spot for those you want to target (strongly focus on one social network), properly manage your contacts and the site, give audiences the material and “content they need to pass on your viral marketing,” mobilize the information posted on your social media sites (be sure that the links can be easily copied for people to re-post the links elsewhere), carefully compose your content, market links back to your organization’s website, keep an eye on the statistics of how many are visiting your site, and build momentum on your social network sites by starting discussion groups and comments (198-199). Apart from these recommendations, the SLO Farm Bureau must ask itself if it is ready to embrace the social media world. One of the questions regarding technological developments on Worksheet #4 is how the recent trends in communications technology will affect the organization and that is something the SLO Farm Bureau must critically think through. Becoming a part of a social network requires time, commitment, and resilience, yet embracing these new technologies may bring the SLO Farm Bureau to a new level that it never thought was achievable.

Worksheet #5, for step two, asked the SLO Farm Bureau to create a SWOT list (Strengths, Weaknesses, Opportunities and Threats). Much of what is listed on the worksheet has previously been discussed, but one of the strengths that should be acknowledged is that the

SLO Farm Bureau is a grass roots organization that is driven by its members. The SLO Farm Bureau should be constantly re-examining their macro-environment, as required for step two, simply because the livelihood of the nonprofit's success is dependent on outside members. Worksheet #6, for step two, lists all the community partners and stakeholders who should be considered "when building the [SLO Farm Bureau] communications plan" (Patterson and Radtke 53). It is impressive to see how many colleagues, partners, sponsors, community groups, and businesses collaborate with the SLO Farm Bureau. Having a defined network of community partners and stakeholders will "help the [nonprofit] recognize the full range of resources that can potentially be tapped to help achieve the plan's objectives" (Patterson and Radtke 53).

Worksheet #7, for step three, helps the SLO Farm Bureau create an audience profile of their target audiences. By working through the worksheet with the Executive Director, a tremendous amount of information was gathered to assist the SLO Farm Bureau in their strategic communications planning process. The SLO Farm Bureau identified their five priority audiences on Worksheet #6 (Agricultural members, Associate members, non agricultural "general" audiences, potential new members, and policy members) and now on Worksheet #7 they were able to describe and show that they truly *understand* their audience. The SLO Farm Bureau describes their audience as: people in production agriculture or associated/supporting the agricultural industry and those concerned with over regulations and taxes from a population who is removed from agriculture. Such is a very thorough description, yet to make the audience description an audience definition, the SLO Farm Bureau should include the age, education level, income levels, etc. of their audience. Patterson and Radtke strongly support the practice of a nonprofit organization fully *understanding* their audience, as opposed to simply *knowing* priority

audiences. From the data gathered, the SLO Farm Bureau does appear to be connecting effectively with their priority audiences.

The SLO Farm Bureau has researched their target audiences by finding out what exactly is important to them. To Agricultural members, they desire to have the SLO Farm Bureau fight issues that will directly affect them and during that process, they want to be educated on issues and what exactly is being done to oppose them. To Associate members, they desire to be educated on the agriculture that surrounds them on the Central Coast, they want to be a part of social gatherings, and above all else, they want to support local farmers, ranchers, and others in agriculture. The SLO Farm Bureau understands why their members are important to them and SLO Farm Bureau members understand why the SLO Farm Bureau is important to them. On Worksheet #7, the SLO Farm Bureau wrote what they want from their audience: they want to educate, motivate, and activate audiences so that their voices are heard and they become knowledgeable about the issues facing agriculture on the Central Coast. The SLO Farm Bureau seems to be achieving in their efforts to educate their audiences, yet more could be done with regards to “motivating” and “activating” their audiences.

In my interviews with the Executive Director, I was told that it is difficult at times to gain members and move members to action because some individuals believe that the SLO Farm Bureau will continue to fight issues and be a voice for agriculture regardless of whether or not they join the SLO Farm Bureau or participate. Although this particular mindset frustrates the SLO Farm Bureau, Patterson and Radtke contend that those individuals (audiences) should be categorized as *the engaged public*. They are the individuals who need to be motivated and “the message strategy [targeted towards them] must be to transform their awareness of the problem” (Patterson and Radtke 66). The SLO Farm Bureau needs to create a new marketing tactic to

prompt these certain audiences to action. Although the SLO Farm Bureau's top two priority audiences (members) do receive the electronic monthly Ag Update magazine, the quarterly *San Luis Obispo Country* magazine and the electronic "Notes from Farm Bureau", it may be necessary to send out a "Call to Action" notice, possibly along with the electronic Ag Update magazine or "Notes From Farm Bureau". The "Call to Action" could be an event that the SLO Farm Bureau wants more attendees at or maybe even a policy hearing that more members should attend. Presenting a challenge to those un-motivated individuals, may give them the extra push/incentive they need to get involved and be an active member.

Assessment of Steps Four, Five, Six and Seven Completed Worksheets

Worksheet #8, for step four, lays a proper foundation for the SLO Farm Bureau to write out two of their current communications objectives. Step four focuses solely on communications objectives and such is a vital element of any strategic communications planning process. An organization must set goals and objectives in order to properly measure achievements and successes. The two objectives listed by the SLO Farm Bureau, on Worksheet #8, were: 1.) Motivate Agricultural members to rally against the Irrigated Ag Waiver (water issue) and 2.) Continuously reach out to Associate members. Although those were the initial objectives written on the worksheet before they were fully developed, the SLO Farm Bureau's communications objectives are lacking in some particular areas. According to Patterson and Radtke, one of the most important elements of an objective is that it should have a realistic target date. Both of the given communications objectives, from the SLO Farm Bureau, lack a definite target date. However, both objectives are continuously on-going; therefore, the question might be raised as to how the SLO Farm Bureau would go about making specific target dates for those types of objectives. The solution lies in breaking down each of the objectives into smaller objectives.

From making smaller, more attainable objectives, target dates can be used. For example, instead of the SLO Farm Bureau stating they want members to be present at more political hearings, the SLO Farm Bureau can set a definitive number of attendees which they would like to see at hearings. Patterson and Radtke state that the nonprofit organization “should be specific about what must be accomplished and set specific target dates—either in numbers or percentages of an existing figure—that can be counted and/or measured along the way” (81).

When crafting or assessing communications objectives, a nonprofit must consider the SMART test formula, which was mentioned above in step four. A nonprofit organization, more specifically the SLO Farm Bureau, needs to ask whether their communications objectives are Specific, Measurable, Achievable, Realistic, and Time-Bound (Patterson and Radtke 80). If all five of those areas are truly considered, prior to writing a communications objective, the end result will be a brilliant, attainable objective that can be measurable and witnessed. The SLO Farm Bureau does have realistic and achievable objectives, yet their objectives are difficult to measure and currently they are not being measured. If one refers back to Worksheet #2, it is evident that although the SLO Farm Bureau has written/concrete goals and supporting objectives, they lack the measurement element of monitoring if the objective has been met yet. However, without benchmarks and target dates it is difficult to measure the progress and possible success of their objectives. Since the SLO Farm Bureau creates committees for different projects, they should create a committee for assessing current goals and objectives. Next to each objective there should be a given target date for when the objective is to be accomplished, because, “any organization can begin a measurement program immediately by identifying the objectives that management cares about and finding ways to tie communication goals to these

objectives—the first step is to make a commitment to measurement” (Woods 18). Although such is a very challenging task to do, it is essential for the success of the organization.

Worksheet #14, for step seven, takes developing communication objectives a bit further, with providing spaces for the SLO Farm Bureau to write out activities to measure, impacts to measure, and the revision of the initial communications objectives to demonstrate the impact on audiences. For Worksheet #14, the SLO Farm Bureau, along with my assistance, wrote two new communications objectives. By working through the worksheet together, the SLO Farm Bureau was able to create more specific and measurable objectives. The key is for them to take Worksheet #14 and craft all their communications objectives with the same structure. Measuring the communications impact of an objective shows how certain individuals are being reached and what individuals are coming to support the SLO Farm Bureau in furthering its mission. The SLO Farm Bureau should change their current communications objectives to follow the guidelines set forth by the Patterson and Radtke model, in order for them to have well-written communications objectives that enable them to measure their successes.

Worksheet #10, for step five, focuses on having the SLO Farm Bureau assess how they are currently developing their messages. The worksheet requires the SLO Farm Bureau to write out their current organizational description, the impression the organization wants to make, and what overarching themes describe the organization (Patterson and Radtke 109). The SLO Farm Bureau does not have an organizational description, yet by working through the worksheet, they were able to create a rough description. Having a usable description will provide the SLO Farm Bureau with a consistent message about its mission and work. By working through Worksheet #9, prior to Worksheet #10, the SLO Farm Bureau was able to brainstorm words that could be very impactful if used in the organizational description. The SLO Farm Bureau was able to list a

plethora of different words and all could be very effective if used in the nonprofit organization's message development. The final 20-word organizational description that the SLO Farm Bureau created is, "The SLO Farm Bureau is a nonprofit, voluntary organization that strives to solve problems based on grassroots recommendations of its members". As a collective whole, this organizational description does follow the guidelines set forth by the Patterson and Radtke model; however, the major determining factor of its effectiveness lies in whether or not every employee and volunteer at the SLO Farm Bureau uses this same language. An organizational description must create a common language for all to use and comprehend. The SLO Farm Bureau should interview their committee leaders and Board members to see if they would use the same organizational description of the SLO Farm Bureau in the same way and with the same word choices and language as the Executive Director used.

Worksheets #12 and #13 focus on looking at the current communication vehicles and strategies being used by the SLO Farm Bureau. As mentioned before, the SLO Farm Bureau has three website/email vehicles, one face-to-face vehicle, and one print vehicle. The SLO Farm Bureau wrote that their two email communication vehicles and the *San Luis Obispo Country* magazine are most effective for reaching target audiences, yet their website is the vehicle which needs the most improvement. From reading through each of the email publications dispersed by the SLO Farm Bureau, their message and mission are conveyed through each. The slogan on each of the "Notes from Farm Bureau" emails, says "Keeping you informed of the issues" and it does just that. Through the pages, the Executive Director writes a paragraph about each "top issue", and calls attention to future hearings and meetings. All the information is compiled in a well-organized, easy accessible email newsletter format. The Executive Director does an excellent job of summarizing various issues into smaller paragraphs, which makes the material

more conducive to members actually reading the material. Often times the Executive Director provides links at the end of her brief summary of a particular “top issue” to provide members with additional information, if they so desire. Also, each of the email publications begins with the title, “Dear Jackie” making members feel engaged in the reading material.

The SLO Farm Bureau does reach optimal numbers of individuals with only three main publications/communication vehicles. Each communication vehicle reaches more than one audience and such saves the SLO Farm Bureau time, money, and manpower. One recommendation would be for the SLO Farm Bureau to explore additional communication vehicles. In order for the SLO Farm Bureau to continue to prosper, it must take advantage of social media marketing in order to reach younger audiences, as stated above. The SLO Farm Bureau should create an account on Facebook.com, Twitter.com and they should start a blog. The SLO Farm Bureau needs to be ready in order to keep its membership numbers high. With the SLO Farm Bureau’s current plan to hire an additional staff member to work part-time on membership and social media outlets, they will be making a true investment into their future. The Executive Director told me that the SLO Farm Bureau does have a Facebook page; however, no one is currently monitoring or updating the page. Beginning a blog, possibly on WordPress.com, could be a tremendous social platform to write about certain agricultural practices, families in agriculture, or about current issues being debated in the county. The key with blogging is to research what individuals read blogs, so “you can understand what percentage of your total customer base you’ll reach via marketing on blogs” (Singh 29).

Conclusion/Closing Review of Recommendations for the San Luis Farm Bureau

From the review/assessment in the above pages, numerous recommendations have been made with the hopes that the SLO Farm Bureau will progress forward and act upon these given

recommendations. Above all, the hope is that they continue to use the collected data, in Appendix A, to make their nonprofit organization efficient, effective and prosperous. By comparing the data collected, from the SLO Farm Bureau, to the Patterson and Radtke model, the SLO Farm Bureau can trust the credibility of the above recommendations. Through their many years of experience in strategic communications, Patterson and Radtke have created an incredibly useful seven step model for nonprofit organizations who want to create a strategic communications plan or want to assess their current strategic communications plan. The review of the seven steps in part one can be seen as a crash-course in strategic communications planning. By bringing in other peer-reviewed journal articles, in addition to information from the Patterson and Radtke book, a nonprofit organization can see that these tasks, terms and strategic communications elements are legitimate and necessary for the success of a nonprofit organization.

The above recommendations are not all encompassing. There are various areas where the SLO Farm Bureau is achieving successes and there are additional areas where improvements and changes should be made. The essential building blocks that can be improved are mentioned above, with the idea that smaller changes are more conducive to actually being done, as opposed to listing everything that is wrong within the organization. The smaller recommendations above, for the SLO Farm Bureau, include: strengthening the mission statement to discuss the *business* of the SLO Farm Bureau, updating goals and objectives by ensuring they are measurable and have target dates, updating the website and improving the staff's general knowledge of technology and social media sites, growing membership by targeting younger audiences, putting together a generic presentation to educate groups on what the SLO Farm Bureau does, and, along with

many other more specific recommendations, the SLO Farm Bureau must enter the social media world.

Thinking strategically is not always something that nonprofit organizations are trained to do. They are united in their mission and such becomes their top priority. However, without acknowledging and participating in strategic communications planning, a nonprofit organization will fail to achieve its upmost potential. Therefore, from completing this project, I hope to have cultivated the spirit of strategic communications planning in the SLO Farm Bureau and in every other future reader of this project. I have a heart for the efforts that are done by nonprofit organizations and with education and awareness of the need for strategic communications planning, a nonprofit organization can reach more people, utilize resources more effectively, create measurable goals, and target priority audiences, to ultimately further their mission.

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Appendix A

Worksheet #1 “Readiness for Strategic Communications”**NAME OF ORGANIZATION: San Luis Obispo Farm Bureau**

Key

Y = Yes, in place NW = Needs more work N = No, not in place

- Y NW N 1. Does our organization have a clear strategic vision that supports our mission and guides our communications work? They do have a mission statement.
- Y NW N 2. Is our mission statement a concise, accurate description of who our organization is and the work that we do? Yes and it is on many publications- except it was called to Jackie’s attention that the mission statement is no longer at the end of the e-mail newsletter, “Notes from Farm Bureau”.
- Y NW N 3. Does our organization have a strategic plan that guides the staff in its communications and outreach efforts? If not, do we need to conduct a communications audit? No, but they have direction with their Communications Committee, all of which are volunteers.
- Y NW N 4. Is our communications and outreach work successfully advancing the mission of our organization?
- Y NW N 5. Do we know who the priority audiences are? Do we know what we want them to do? Yes, voting members and Farm Bureau supporters- now new member groups: agriculture (consists of those who own farmland and are directly involved in agriculture), associate (consists of those who want to support agriculture, want the social aspect the Farm Bureau provides and want the Farm Bureau publications, and collegiate (consists of those members who are in college).
- Y NW N 6. Are our messages clear, concise and designed to motivate our priority audiences to take action?
- Y NW N 7. Do the strategies and communications vehicles that we use work in concert to achieve the maximum communications impact? Such is attempted, yet not always achieved. One of the major challenges facing the Farm Bureau is lack of funds to support a large staff.
- Y NW N 8. Do we have a clear mechanism for monitoring and evaluating our communications work? Such is attempted, yet monitoring and evaluating communications work needs to be more routine.
- Y NW N 9. Have we allocated sufficient resources to ensure the success of our strategic communications plan? Yes, have the finances and manpower to do it. Both Mary and Joanie work closely together to make communication efforts effective.

Priorities for the Strategic Communications Plan

- have a clear vision
- conduct communications audit to evaluate communication efforts
- ensure that communications and outreach programs are actually advancing the mission of the SLO Farm Bureau
- evaluate communication vehicles, see which make the most impact
- include strategies to better monitor and evaluate communications work

Three concrete areas:

1. Continue to reach members with “Notes from Farm Bureau”.
2. Keep focus on informing those who desire to know what is happening with agricultural issues.
3. Find a good marketing strategy for getting the *San Luis Obispo Country* magazine out to local businesses (on their business materials displays) and continue to attract associate members in with the publication.

Worksheet #2 “Mission Statement ad Goals” – Step 1

MISSION STATEMENT

To lead San Luis Obispo County in the protection, promotion, and advocacy of agriculture for the benefit of our members and community.

-The following goals were written at the SLO Farm Bureau’s Strategic Committee meeting in November of 2008.

✓= goal has been accomplished/is currently being accomplished

GOALS

1. Address critical issues to ensure the sustainability of agriculture.
 - ✓a.) Assist California Farm Bureau Federation (CFBF) in the implementation of CFBF’s Farm Team and use of our local Farm Team.
 - ✓b.) Improve on “Notes from Farm Bureau”.
 - ✓c.) Create a Communications ad hoc committee.
2. Ensure the economic stability and future growth of San Luis Obispo County Farm Bureau.
 - a.) Increase membership in ~~President’s Club~~. No longer done.
 - ✓b.) Enhance the Real Property Committee. Ongoing, currently renting out the majority of the rental spaces on the property.
 - c.) Educate Board on our property situation. Such has been very tough, yet the committee is moving forward.
3. Increase San Luis Obispo County Farm Bureau membership and enhances its value.
 - a) Hold membership drives.
 - b.) Work with Allied/Nationwide, Health Net and State Fund on promotional drives.
 - c.) Hold “town hall” meeting with policy makers for our members.
 - d.) Hold “Regional” Board meetings to include membership at large.
 - e.) Identification for differential value for voting membership.
 - f.) Create a membership committee. Has not yet happened
 - g.) ~~Create a Buy local web page for our voting members.~~
 - h.) Create a communications ad hoc Committee to review the *Farmer and Rancher Magazine* and “Notes from Farm Bureau” publications.

SLO Farm Bureau has lagged in each of these areas, yet they plan on hiring a new staff member part-time to work on membership specifically

<p>4. Communicate with and educate policy makers, the media and public on the issues and values of agriculture.</p> <ul style="list-style-type: none"> a.) Send timely news release to media. Has not been done for some time. b.) Work with media using a one-on-one approach. Jackie would really like to see this happen. ✓c.) Meet with the Board of Supervisors (BOS) on a regular basis. d.) Participate in agricultural literacy and outreach programs. ✓e.) Take advantage of public speaking opportunities to promote and educate. f.) Create a committee to assist in creating our county's endorsement policy. Political Endorsement Committee meetings have completely stopped. g.) Create a power point presentation. Has not happened yet, but it would simply be a power point with general information about the Farm Bureau and what it does. The hope was that Board members would make informative presentations about the Farm Bureau at their places of work. ✓h.) Create an Ag directory
<p>5. Actively build coalitions with agriculture and community organizations.</p> <ul style="list-style-type: none"> ✓a.) Maintain open dialogue with non-agricultural community organizations, such as the <i>San Luis Obispo Tribune</i>, chambers and advisory councils. The Farm Bureau does especially well with reaching out to the Chamber of Commerce. In regards to advisory councils, the Farm Bureau encourages their members to maintain open dialogue with them. ✓b.) Build and maintain relationships with all county agricultural organizations. c.) Bring in other guest to our Board meetings in order to educate them about the Farm Bureau and to hear from them. Cal Poly students have come to sit in Board meetings, yet not often.
<p>6. Build/Maintain an active San Luis Obispo County Farm Bureau Board of Directors. This entire category is a work in progress.</p> <ul style="list-style-type: none"> ✓a.) Enhance the Committee structure ✓b.) Streamline communications keeping directors and key members informed. c.) Hold new Board orientation session. ✓d.) Invite young members to sit on Farm Bureau committees. e.) Promote a Board of Directors that reflects the diversity of San Luis Obispo County agriculture.

Worksheet #3 “Communications Audit Summary”- Step 1

Step 1. Decide whether the organization has been effective or not effective in performing this function.

Step 2. Rank the 5 most critical steps for the success of this strategic communications planning process for your organization at this time. Check the appropriate boxes.

Category	<i>Not Effective</i>	<i>Effective</i>	Rank the Top 5
COMMUNICATIONS POLICY			
a. clear mission, goals and strategic plan.	1 2 3	<u>4</u> 5	<u>2</u>
b. strong brand and design identity	1 2 3	4 <u>5</u>	
c. clear messages and language platform	1 2 3	<u>4</u> 5	
d. clear, consistent logo, images and visuals	1 2 3	4 <u>5</u>	
e. effective media relations plan	1 2 <u>3</u>	4 5	<u>5</u>
f. strong website – currently changing website	1 2 <u>3</u>	4 5	
g. effective membership/outreach strategy	1 2 <u>3</u>	4 5	<u>1</u>
h. clearly identified audiences including their information needs	1 2 3	4 <u>5</u>	
COMMUNICATIONS PRACTICES			
a. board support for communications	1 2 3	4 <u>5</u>	
b. senior mgmt support for communications	1 2 3	4 <u>5</u>	
c. cost effective, sufficient financial resources	1 2 3	4 <u>5</u>	
d. communications is fully integrated into every org program, project and strategy	1 2 3	<u>4</u> 5	<u>4</u>
e. most staff members have some knowledge and participate in the communications efforts	1 2 3	4 <u>5</u>	
f. clear editorial policy including roles and responsibilities for who writes, who edits and who has final approval of content	1 2 3	<u>4</u> 5	
COMMUNICATIONS CAPACITY/PRODUCTION			
a. experienced and reliable staff	1 2 3	4 <u>5</u>	
b. strong production team	1 2 3	<u>4</u> 5	
c. clear production guidelines	1 2 3	<u>4</u> 5	
d. website has user centered design	1 2 3	<u>4</u> 5	<u>3</u>

Worksheet #4 – Step 2
“Situation Analysis”
Examining the External Environment

Demographics:

Who are the primary groups that benefit from the organization?
 People in agriculture and those who want to support agriculture.

Has there been a shift or change in the populations or the makeup of the communities that it serves? If yes, what does that mean? If no, is that cause for alarm?

Yes there has been a shift in membership make-up as the aging of members continues. During the past three years, the SLO Farm Bureau has experienced declines in memberships as their members literally die. It has been a challenge to gain younger members and such is cause for alarm. The Farm Bureau has created a collegiate membership this past year and they are trying to connect with people who are not farmers themselves, but want to be involved in the agriculture cause. The way to reach non-agriculture members, called associates is through the *San Luis Obispo Country* publications. However the Farm Bureau is cautious to put in too much time and effort into new means of communications if they are not gaining members from it.

Economic:

What are the sources of revenue for the organization? Is it sufficiently diversified?

Yes the sources of revenue for the organization are sufficiently diversified due to them making money from three different areas: property rent income, membership dues, and gold royalties from the California Farm Bureau Federation in Sacramento, CA.

How do members perceive the organization and what does that mean for its financial future (consider government funding, foundations and corporate contributors)? Is the economy shifting in ways that will cause a growth or a decline in demand for services from the populations that the organization serves?

The recession has definitely hit the Farm Bureau in many ways, yet regardless of the economy members will always be faced with political issues that need to be addressed by the Farm Bureau. The Farm Bureau's services will always be needed, yet the problem lies with whether or not people in agriculture will continue to pay for those services through their membership fees. The Farm Bureau has followers who do not pay dues because they feel the same work and same issues will be fought regardless of whether they are a paying member or not.

Technological developments: What are the latest trends in business technology that might allow our organization to be more effective? What are the latest products or trends in on-line technology that could impact the work – program development, technical assistance, volunteer recruitment, training, education, etc? How will recent trends in communications technology effect the organization? Does the organization need to improve its technology to create a better product, improves services, conduct more cost-effective advocacy efforts?

Advancements with social media marketing will definitely effect the organization, especially with the use of Facebook and e-mail notifications. Currently “Notes from Farm Bureau” are the newest technology improvement and Jackie is very selective with who the updates are sent to. On the site that Jackie uses to put together “Notes from Farm Bureau” it is possible to see how many people are opening the document and how many have not. Jackie also uses “Notes” as a tool to lure in past members who have not paid their dues in recent months/years. This is done by Jackie sending them the link to “Notes” yet the individuals are unable to read the updates. Instead there is a link telling them that if they would like to receive the entire document they must first renew their membership.

The Farm Bureau is currently re-doing their website to make it more user friendly with a new format. There are still areas where the organization needs to improve its technology.

Political: How do current political priorities influence the organization and its work? What will be on the national, local, and state political agenda this year? Could it affect the organization or the populations that it serves? If the winds blow our way, what can we expect? If they go against us, what’s the worst that can happen? Is there something we’re **not** seeing?

The Farm Bureau’s entire platform revolves around fighting political issues that involve agriculture. Currently, the main issue is the agriculture issue of the Irrigated Ag Waiver.

Worksheet #5 “Strengths, Weaknesses, Opportunities, Threats”- Step 2

<p>What are the strengths of the organization?</p> <ul style="list-style-type: none"> -The Farm Bureau is a grass roots organization driven by its members. -It has support at the state and national level. -It has been around for many years, which has created credible recognition for the organization. -It has a strong Executive Committee: congenial, knowledgeable, talented staff members.
<p>What are the weaknesses of the organization?</p> <ul style="list-style-type: none"> -It has aging members. -Often times there are limited funds, somewhat dependent on the economy. -There are challenges from the diversity of members. It is hard to take a position on an issue that will please all members because the Farm Bureau takes positions that benefit all agriculture in general. -Not all staff members/Board members are technologically savvy. -Board members are older males who are often times too opinionated, which results in little open discussion and forward movement.
<p>What opportunities exist in the next 18 months?</p> <ul style="list-style-type: none"> -Budget permitting, the Farm Bureau will be hiring a new part-time staff member to focus on fundraising, membership and social media marketing. -There is great interest in the rental property and all may be rented out in the next couple of months.
<p>What threats exist in the next 18 months?</p> <ul style="list-style-type: none"> -Getting the Board to approve the cost of rental property renovations. -The unknown of whether the economy will go down anymore.

Worksheet #6 “Community Partners and Stakeholders”- Step 2

List all of the organization, groups and individuals in each category that are critical to your organization. Consider why they are important to your organization. Place a check in front of those organizations that your organization might collaborate.

<u>Category/name</u>	<u>Reason for connection</u>
Colleagues at other organizations	
<u>Lisa Bodrogi- Paso Robles Wine Country Alliance</u>	<u>Works on local agricultural issues</u>
<u>Richard Quandt-Grower/Shipper, SLO and SB Counties</u>	<u>Works on local agricultural issues</u>
<u>SLO County Cattlemen- JoAnn Switzer</u>	<u>Works on local agricultural issues</u>
<u>SLO County Cattlewomen- Anna Negranti</u>	<u>Works on local agricultural issues</u>
<u>CC Greenhouse Growers Association- Amy English Sage</u>	<u>Works on local agricultural issues</u>
<u>UC Cooperative Extension- Mary Bianchi</u>	<u>Provides technical support</u>
<u>San Luis Obispo County Ag Commissioner and Staff</u>	<u>Provides assistance</u>

Organizations with similar program interests and values or with whom we partner

<u>All organizations above</u>	<u>_____</u>
<u>San Luis Obispo Vinters & Grower Association</u>	<u>_____</u>
<u>Central Coast Agri-Tourism Council</u>	<u>_____</u>
<u>Central Coast Agricultural Network</u>	<u>_____</u>
<u>CA Women for Agriculture</u>	<u>_____</u>
<u>_____</u>	<u>_____</u>

Organizations that oppose our work

<u>The Sierra Club</u>	<u>_____</u>
<u>_____</u>	<u>_____</u>

Activists/advocates (for us) all those under “Colleagues”

Activists/advocates (against us) Sierra Club Representatives

Board members Richard Gonzales (President), Paul Clark, Don Warden, Tom Ikeda, Dan Sutton, Carlos Costaneda and Mark Moore.

Category/name	Reason for connection
Sponsorships	
<u>Business Members (see attached paper)</u>	<u>Pay higher membership dues</u>
<u>Various advertisers</u>	<u>Help fund our communication</u>
<u>Various businesses when we fundraise</u>	<u>Fundraising</u>
<hr/>	
Community groups	
<u>SLO, Paso Robles and Atascadero Chambers</u>	<u>Lend support</u>
<u>ECO SLO</u>	<u>Have shared positions on issues</u>
<u>Economic Vitality Corporation</u>	<u>Has diverse Board- great outreach</u>
<hr/>	
<hr/>	

Category/name	Reason for connection
Reporters, editors, media outlets, specific programs	
<u>The San Luis Obispo Tribune</u>	<u>Keep them abreast</u>
<u>New Times SLO</u>	<u>Keep them abreast</u>
<u>KSBY News and KCOY news</u>	<u>Keep them abreast</u>
<hr/>	
Government officials/policy makers	
<u>Board of Supervisors</u>	<u>Keep them abreast</u>
<u>Planning Commission</u>	<u>Keep them abreast</u>
<u>Senator Sam Blakeslee</u>	<u>Keep them abreast</u>
<u>Assemblyman Katcho Achadjian</u>	<u>Keep them abreast</u>
<u>Congressman Kevin McCarthy</u>	<u>Keep them abreast</u>
<u>Congresswoman Lois Capps</u>	<u>Keep them abreast</u>
<hr/>	
Small business owners	
<u>Some Associate members</u>	<u>fundraising and promoting</u>
<hr/>	
<hr/>	

REVIEW YOUR LIST AND SELECT AT LEAST FIVE (5) PRIORITY AUDIENCES THAT WILL BE THE FOCAL POINT OF YOUR STRATEGIC COMMUNICATION EFFORTS.

1. Agriculture members
2. Associate members
3. non agricultural “general” audience, other than members
4. potential new members
5. policy makers

Additional Business Members

Acquistapace Farms, Inc.
Adler Belmont Dye Insurance
Ag Box Company
Produce Containers
California Meridian Insurance Services
C&M Nursery
C&N Tractors
Central Coast Propane
Coast National Bank
Days Inn
J. B. Dewar Inc. Petroleum Products
Eagle Energy, Inc. DBA Henderson Petroleum
Electricraft, Inc. Electrical Contractors
Ewing Irrigation
Farm Supply Company
Filipponi & Thompson Drilling Co.
Heritage Oaks Bank
Hub International Insurance Services
InWest Insurance Services
TWIW Insurance Services
Kronick Moskowitz Tiedemann & Girard
E. C. Loomis & Son Insurance Associates
Madonna Inn
Nick's Telecom
Home and Business Communications
Pacific Sun Growers, Inc.
Pat Phelan Construction
House and Barn Pads; Septic Systems; Road, Reservoir
and Vineyard Work
Quinn Company

Worksheet #7 “Audience Profile” – Step 3

AUDIENCE: San Luis Obispo Agricultural Members

1. Describe your audience: What are their concerns? What characteristics of your audience are important to your organization (e.g. their education levels, income levels; family size, health issues)?
They are people in production agriculture or associated/supporting the agricultural industry. The audience is concerned with over regulations and taxes/fees from a population who is removed from agriculture.
2. Why are they important to you?
They are SLO Farm Bureau members who support the Farm Bureau organization, which is a grass roots organization.
3. Why should your audience care about your organization and its issues?
As a grassroots organization they move the organization in the direction they want. The issues at hand will directly affect them.
4. What do you want from this audience?
“Educate-Motivate-Activate”- so that their voice is heard.
5. How does this audience receive information?
Through the electronic monthly Ag Update magazine, the quarterly SLO County Magazine, and through electronic “Notes From Farm Bureau”
6. Are there particular individuals who have credibility or power over the target audience? What are their names?
The President of the Board of Directors- not are all active or have the credibility or power over the audience. Richard Gonzales (President), Paul Clark, Don Warden, Tom Ikeda, Dan Sutton, Carlos Costaneda and Mark Moore.
7. Are there other individuals that can help you better reach this target audience? Who?
The SLO Farm Bureau’s professional Young Farmers and Ranchers- Nicole Black, Sarah Bandy, Megan Brownell and Meghan Judge
8. How will you know if you have successfully reached this audience?
When the certain individuals become active and supporting members of the San Luis Obispo Farm Bureau.

Worksheet# 8 “Develop Smart Communications Objectives” - Step 4

Communications Objective #1- Motivate Agriculture members to rally against the Irrigated Ag Waiver (water issue)

Target Audience: Agriculture members Number: 900

Select One: Inform Engage **Motivate** Maintain

Desired Action: Become educated by means of “Notes from Farm Bureau” and take part in the fight against the Irrigated Ag Waiver. Become more involved at political hearings and inform the general public about the true facts behind the waiver.

Target Date: May 3- “Notes from Farm Bureau” will be sent out with specific details about the decisions to be discussed, yet it will be an ongoing objective because there are only drafts being made for the policy. Hearings and debates could continue until September.

State Objective: The SLO Farm Bureau wants to reach out to them by means of “Notes from Farm Bureau” to educate/motivate members continuously about the outcomes of each hearing. The SLO Farm Bureau also wants to encourage members to attend to more important hearings, where attendees can have the chance to speak.

Communications Objective #2- Continuously reach out to Associate members.

Target Audience: Associate members Number: 900

Select One: **Inform** Engage Motivate Maintain

Desired Action: Become active within the SLO Farm Bureau, even though not involved in agriculture. For them to understand and be literate about agriculture issues in San Luis Obispo County and for them to be a source of information for the general public.

Target Date: Continuously on-going

State Objective: Keep Associate members informed. Educate them by means of the San Luis Obispo Country magazine and provide them with numerous sources to keep them updated on current events happening in agriculture.

Worksheet #9 “Language Worksheet”- Step 5

**WORDS CURRENTLY USED TO DESCRIBE
OUR ORGANIZATION OR THE WORK WE DO:**

- nonprofit
- membership organizations
- promote
- educate, motivate, activate
- support farmers and ranchers
- policies
- address issues

**WORDS TO AVOID WHEN TALKING ABOUT OUR
ORGANIZATION AND THE WORK THAT IT DOES:**

- agribusiness
- industry

**NEW WORDS THAT COULD HAVE THE GREATEST
IMPACT ON OUR TARGET AUDIENCES:**

- FAMILY farmers and ranchers (with the use of family the Farm Bureau is able to avoid saying large, small operations)
- beneficial
- enhance farming environment
- farming would not be where it is now with the efforts of the Farm Bureau

TIPS: Test Each Word: Does It Convey An Emotion? Does It Have Impact? Does It Have Meaning To Civilians? Is It Persuasive?

Taken from: Patterson and Radtke. “Strategic Communications for Nonprofit Organizations” 2009.

Worksheet #10 “Organization Description”- Step 5

CURRENT ORGANIZATION DESCRIPTION

-The SLO Farm Bureau does not have one, only a mission statement.

What is the impression the organization wants to make?

The SLO Farm Bureau supports local farmers and ranchers.

What themes describe what the organization wants everyone to know about them?

1. The SLO Farm Bureau has voluntary members.
2. Policies and programs are developed from grassroots recommendations of its members.
3. The SLO Farm Bureau’s greatest contribution is in problem solving as a voluntary, united group, not by appeal to government.
4. The SLO Farm Bureau is a trusted voice for agricultural.

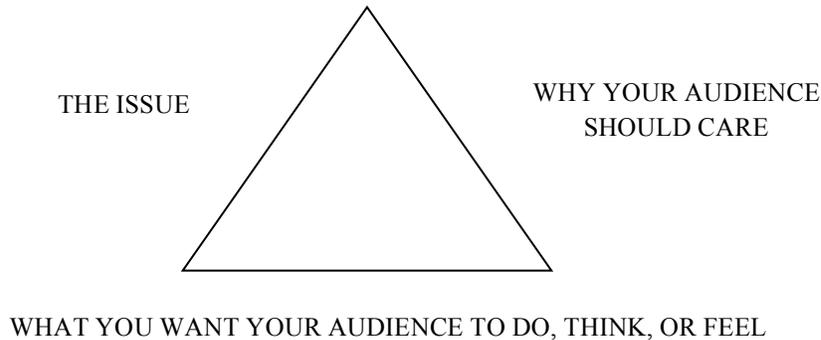
NEW 20-WORD ORGANIZATION DESCRIPTION

The SLO Farm Bureau is a nonprofit, voluntary organization that strives to solve problems based on grassroots recommendations of its members.

Worksheet #11 “Develop Persuasive Messages”- Step 5

Target Audience: General Public

Desired Change: For the general public to realize that farmers are not consuming too much water and they are not over drafting the Paso Robles water basin.



Part 1 (The issue)

Water quantity in San Luis Obispo County. The Paso Robles water basin is over-drafted and all fingers are pointing to those in agriculture.

Part 2 (Why your audience should care)

If the general public wants to continue “buying local” they must realize that farmers need adequate amounts of water to produce the array of fruit and vegetables that consumers desire. Without the use of such water, San Luis Obispo residents will not have local farms and produce will be imported from various areas.

Part 3 (What you want your audience to do, think, or feel)

From attending various public hearings on the issue, the audience could educate themselves with the information that the Farm Bureau has proven that the same amount of water has been used this year compared to years past. Also that with the same amount of water being used, farmers are using precision agriculture to produce larger amounts of harvest. Farmers are becoming more efficient and environmentally conscious everyday with the recycling of water and drip irrigation.

Now write a message combining all 3 parts as if you are talking to the audiences.

The water quantity issue in San Luis Obispo county has many people upset with the fact that the Paso Robles water basin is over-drafted and many believe it is farmers who are using so much water. Buying local fruits and vegetables will only be possible if local farms are present in San Luis Obispo County. Come and attend various public hearings on the issue to educate yourself with valuable information about how farmers are using precision agriculture to produce larger amounts of harvest, with the same amounts of water.

Worksheet #12 “Evaluate Existing Vehicles And Strategies”- Step 6

Step 1. List existing vehicles used by your organization. Step 2. Identify priority audiences that could benefit from these vehicles. Step 3. Verify that each vehicle carries the right message. Step 4. Verify that the vehicle is effectively reaching the audience.

STEP 1	STEP 2	STEP 3	STEP 4
Vehicles We Use	Primary Audience	Conveys our Message?	Effective at reaching the audience?
FACE-TO-FACE			
1. Outreach programs (member workshops)	Agriculture members	Yes	Yes
2.			
PRINT			
1. <i>San Luis Obispo Country</i> magazine	Associate members/Agriculture members/general audiences	Yes	Yes, positive responses
2.			
AUDIO			
1.N/A			
2.			
VIDEO			
1.N/A			
2.			
WEBSITE/EMAIL			
1.SLO Farm Bureau Website	general audiences	somewhat	maybe
2.Ag Update emails	Agriculture members/Associate members	Yes	Yes
3.“Notes from Farm Bureau” emails	Voting/Agriculture members/special guests	Yes	Yes

Which vehicles are effective for reaching target audiences?

Emails and the *San Luis Obispo Country* magazine

Which vehicles need improvement?

The San Luis Obispo website. It is hard to find employees who understand web design and staff is limited.

What additional vehicles are essential to reach our communication objectives?

Using more social media sites, such as Facebook and Twitter. Possibly incorporating You Tube videos of certain farming techniques, achievements, etc.

Worksheet #13 “Pulling it all Together” –Step 6

AUDIENCE	FACE TO FACE	PRINT	EMAIL	AUDIO	VIDEO	WEBSITE
1. Associate members	Outreach programs	They are updated on local issues and stories through <i>San Luis Obispo Country</i> magazines.	Ag Update (local information and events, legislative updates)	N/A	N/A	Provides contact information and events to get involved in.
2. Agriculture members	Outreach programs (water quality and safety workshops)	They are updated on local issues and stories through <i>San Luis Obispo Country</i> magazines.	Ag Update (local information and events, legislative updates) & “Notes from Farm Bureau”	N/A	N/A	Provides contact information and direct links for information on policies and issues for these voting members.
3. general audiences/ potential new members	At various events Jackie Crabb, the SLO Farm Bureau Executive Director, speaks at public events about agricultural issues or happenings.	They are updated on local issues and stories through <i>San Luis Obispo Country</i> magazines.	N/A	N/A	N/A	Provides general information for those who do not know what the Farm Bureau is or what it does.

Worksheet #14 “Develop Outcome Measures”- Step 7

Elaborate on the Communications Objectives you created for Worksheet #8, add new if necessary.

Communications Objective #1- Use “Notes from Farm Bureau” to gain support from current members and bring in new members.

Activities to Measure:

1. How many members are receiving it.
2. How many members are consistently opening it –can be accounted for through Constant Contact
3. Which parts are being opened- which links/issues illicit the most interest

Impacts to Measure:

1. Amount of members attending Board meetings/public hearings to speak/hear about current issues or policies that were discussed in “Notes from Farm Bureau”.
2. The amount of energy/support generated by means of the new electronic updates.
3. The number of new members that join the SLO Farm Bureau who want to receive vital information (“Notes from Farm Bureau” that could affect their farms or ranches.

State or revise the Communications Objective to demonstrate impact:

Through the electronic newsletter, “Notes from Farm Bureau”, the SLO Farm Bureau will educate and motivate Agriculture members to become active members and active participants at local political hearings in San Luis Obispo County.

Communications Objective #2- Create a new web design layout for the SLO Farm Bureau website.

Activities to Measure:

1. How many individuals are opening up the SLO Farm Bureau web page.
2. Number of individuals/members following Dashboard (the timeline of current SLO Farm Bureau issues).
3. Number of current members who discuss the improvements- whether feedback about the new site in positive or negative (have a poll or survey on the webpage asking members how they feel about the site).

Impacts to Measure:

1. Amount of interest in the SLO Farm Bureau from non-members (phone calls to the office, emails asking for information, etc.)
2. How local businesses react to new website (will they want to advertise on the web page or will they want to become a business member)
3. Number of people who change their view of nonprofit agriculture organizations (people seeing that agriculture companies are up-to-date and current with the most impressive technology)

State or revise the Communications Objective to demonstrate impact:

The SLO Farm Bureau will create a new website to reach more audiences and to present pertinent, up-to-date information to both current SLO Farm Bureau members and potential new business and individual members.