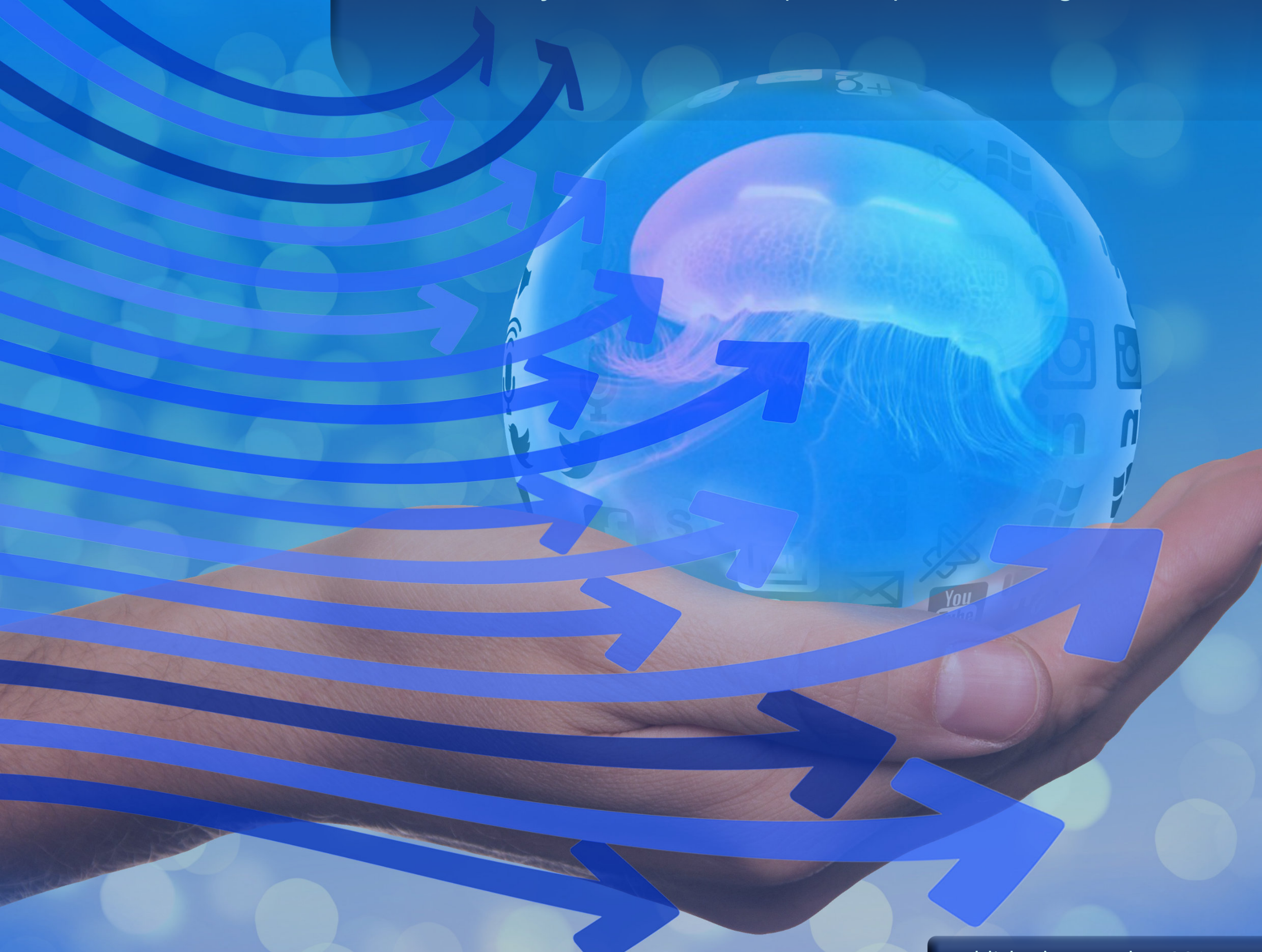
Writing a Communication Strategy:

A Step-by-Step Guide and Template

Tailored for International (Marine) Science Organisations



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Tailored for International (Marine) Science Organisations

Produced by Ocean Communicators United

as a contribution to the "Developing Capacity and Societal Awareness" Working Group of the Group on Earth Observations (GEO) Initiative "Oceans and Society: Blue Planet"

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About this document

Background:

The Ocean Communicators United (OCU) group was created in 2014, but its origins date back to the early days of the Partnership for Observation of the Global Oceans (POGO). POGO is a forum created in 1999 by the Directors of major oceanographic research institutions to promote and advance global ocean observations. One of the three pillars of POGO's Mission is to "Work with governments, foundations and industry, to articulate the benefits to society and required funding to build and sustain the [ocean observing] system". Thus, early on, POGO assembled a group of communications experts from among its member institutions, to serve as a forum for exchange of expertise, information and advice, and to support POGO's communications and outreach efforts. This was called the POGO News and Information Group. In 2012, the group was expanded to include a representative from each of the 35 or so POGO member institutions. The group's annual meetings were open to communications experts and representatives from other organisations, and it was suggested that the News and Information Group be expanded to include individuals from other organisations who wished to join. This led to the creation of Ocean Communicators United, which was launched during the First International Marine Science Communication Conference in Porto, Portugal, in September 2014.

Ocean Communicators United is an informal grouping of representatives of international, regional or national oceanographic research organisations that provides a forum for its members to share information, expertise, best practices and materials related to marine science communications.

Its objectives are:

(1) Maintain and share a distribution list of communications points of contact for marine research institutes and international organisations.
(2) Have a permanent presence via the Oceans United website, which provides the terms of reference, lists the members and provides guidelines on joining the group.
(3) Share communications products via e-mail and via social media. The initial focus will be on internal communications (via e-mail, closed LinkedIn group, members' own Twitter accounts).
(4) Have quarterly on-line meetings to discuss particular topics of mutual interest.
(5) Consider holding in-person meetings alongside other relevant international conferences and events, if manageable.

By August 2017, the group comprised of 62 members and 8 Webex meetings had been held, on the topics of: websites, social media, blogging, communication strategies, impact evaluation, outreach activities and communication for World Oceans' Day, the international ocean literacy survey, communicating with policy makers and organising outreach events.

Purpose of the Communication Strategy Guide and Template:

During the OCU meeting focussing on communication strategies, it was noted that most organisations did not make their communication strategies public, and that it was quite difficult to find information on creating communication strategies that was relevant for marine science organisations. It was therefore decided that it would be useful to create a template for communication strategies tailored specifically to (marine) science organisations, and also for the members of the group to share their own communication strategies, where applicable, and if their organisations agreed. A small working group was formed to take on this task, and the following guide was written. It is intended to be adapted and applied by a wide range of users, whether they have a communications background or a scientific background. It can be used to write a communication strategy for an international organisation, programme or project, a research institution, an educational venue, or even a specific product or service. We hope that it will be a useful resource for Ocean Communicators around the world.

Information sources:

The main communication strategy structure and much of the advice presented in this document has been adapted from information provided by the NCVO (National Council for Voluntary Organisations) website Knowhow Non Profit, which is licenced under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International licence. The present document shares the same licence.

Additional information was obtained from a CGIAR document on "Developing a Communication Plan".

Examples (provided in Appendix 1) have been sourced from the Communication Strategies provided by various partner organisations: IODE, IOC, National Aeronautics and Space Agency (NASA), Partnership for Observation of the Global Oceans (POGO), Southern Ocean Observing System (SOOS), United Nations (UN) Oceans.

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1. Why a communication strategy?

First of all, you will need to think about why you want to create a communication strategy and what you hope to achieve with it. Formulating your ideas into a "statement of purpose" (see Examples 1.1.-1.3. in Appendix 1) will give you a goal to work towards and keep you on track as you go through the process of writing your communication strategy and help you to produce a document that is useful for your organisation. Also, this will constitute the introductory part (Section 1) of your strategy. It can be helpful if the statement of purpose lays out the overall communication aim and objectives (see Examples 1.4.-1.5. in Appendix 1).

With the number of international marine science related organisations growing there is often a perception that they have similar or overlapping objectives. It is therefore increasingly important to state clearly what your organisation's unique role is, how it differs from other organisations, who its stakeholders are and how to prioritize and optimize its communication methods with each of these.

Once you have formulated your overall goal, define your key communication objectives. These specify exactly what needs to be achieved by your communication plan. The key to developing objectives is that they are SMART, i.e.:

• Specific—The objective is clear about what you are going to do and exactly how you are going to do it. Questions to ask include: "What am I going to do? Why is it important? Who is going to do it?"

• Measurable—You should be able to measure the objective (Example: % people contacted, number of presentations completed).

• Achievable—The objective is achievable provided the relevant skills, knowledge and capability have been allocated.

• Realistic—The objective is realistic using the time and resources available under current market conditions.

• Time-bound—The objective is clear about how much time it will take to achieve.

Objectives are written in an active tense and use strong verbs like "plan", "write", "conduct", and "produce", rather than "learn", "understand", and "feel".

2. Preparations

2.1. Assembling background information

The starting point for your communication strategy will be to understand your organisation's overall strategy. Start by assembling your organisation's[1] strategic documents and any analyses that the organisation may have conducted. Include in this exercise existing publicly available content (e.g.

[1] The word "organisation" is used throughout this document, but this can be replaced by "institution", "programme", "project" or any other entity for which you require a communication strategy.

website etc). **Always remember that your communication strategy needs to support your organisation's objectives and be closely aligned with your organisation's overall strategy.** Read through these documents and extract the information you will need to write Section 2 ("Current Situation", see below). Having this information fresh in your mind will provide a useful context when tackling the next steps.

2.2. Analysing your organisation's current situation

It is increasingly important for organisations to identify their unique role and periodically assess their relevance in the context of the growing number of peer organisations. The following are examples of tools that can be used to help analyse your organisation's current situation (this is not an exhaustive list, and there may be others that are more suitable for your purposes). If these have not already been done, you may want to suggest one of them to your organisation, as it could be a very valuable exercise to guide your organisation's overall strategy as well as a good basis for its communication strategy.

2.2.1. SWOT analysis

A SWOT Analysis involves listing your organisation's internal **strengths and weaknesses,** and external **opportunities and threats**. Think about what this means in terms of your communication priorities. A SWOT analysis can be used to guide an organisation's communication efforts to play on its strengths and advertise these; to overcome the weaknesses identified; to take advantage of the opportunities identified; and to avoid the threats, or better still turn these into opportunities.

2.2.2. PEST(EL) analysis

This involves listing the **Political, Economic, Social and Technological** (**Environmental and Legal**) factors that could affect your organisation's work. This is a completely external analysis of the factors that provide "opportunities" and "threats", as identified in the SWOT analysis. Depending on the type of organisation and how it operates, PEST(EL) and competitor analyses may not be relevant, whereas a SWOT analysis can be applied universally.

These could be positive or negative factors and should include issues that are likely to have an impact on how your organisation operates. You should indicate why each factor will have an effect. Like the SWOT analysis, this is best done as a group exercise, for example using a flip chart to gather input from the whole group before sorting through and collating the input into a coherent list. Ask your members/governing body/staff/colleagues (as appropriate), to participate.

Make sure you ask the three important analysis questions:

What…
…are the key drivers, trends and forces in the external environment?

So what…
…are the implications for the organisation and key stakeholders and what are the opportunities (and threats and risks)

Now what…
…should the next steps be?

- honing the opportunities down
- creating some strategic options
- making decisions about future plans.

A logic model can also be a useful tool to visualize the organisation's strategic objectives (HOTO Logic model, see Example 2.1 in Appendix 1).

2.2.3. Identifying and prioritising your stakeholders

Think about who your main audiences are – both external and internal. These might include the public, politicians, funding agencies, scientists, end-users and staff. You might also refer to potential audiences that your organisation is keen to connect with.

Many organisations will find that they have many audiences with whom they need to interact. Don't forget your internal audiences – staff, board members etc. Internal communication is a crucial part of any communication strategy. Some organisations may even choose to have a completely separate communication plan for their internal audiences.

Examples of stakeholder groups relevant to ocean science organisations, which may constitute your target audiences:

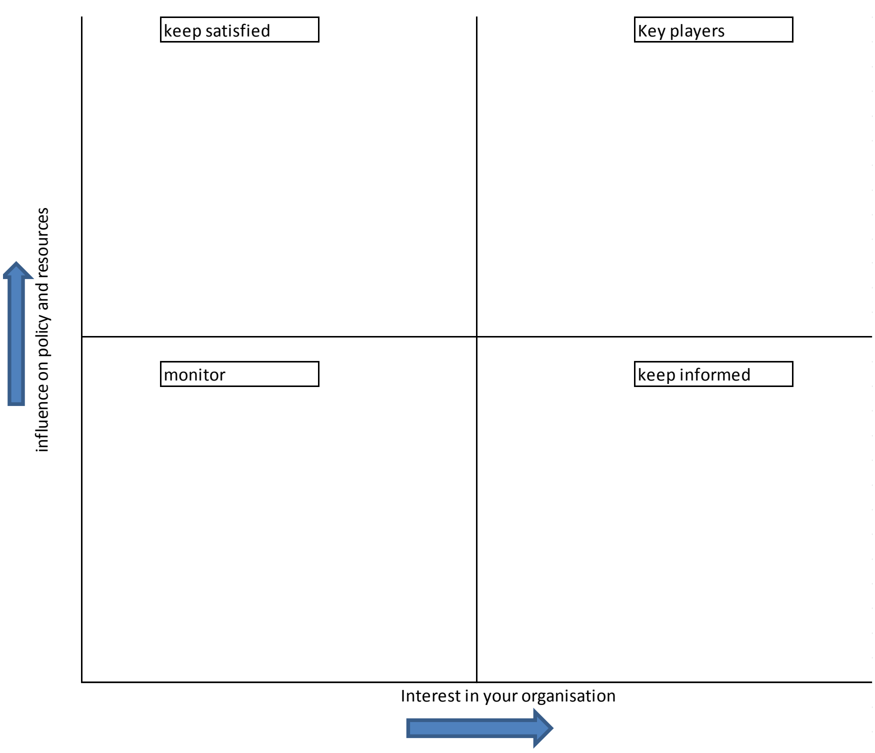
Stakeholder group (target audience)	**Internal/External**
Staff	Int
Organisation's management structures, e.g. Board/Executive Committee/Steering Committee/etc	Int
Parent organisation	Int
Members	Int
Individual scientists	Int and Ext
Sponsor organisation	Ext
Research institutes	Ext
National/international science projects/programmes	Ext
National/international funding agencies	Ext
Philanthropic foundations	Ext
Intergovernmental organisations	Ext
Non-governmental organisations and non-profits	Ext
Government departments	Ext
Policy/management programmes	Ext
Industry (e.g. shipping, tourism, fisheries and aquaculture, oil and gas, seabed mining, telecommunications, energy, insurance…)	Ext
Military services (e.g. navies)	Ext
Formal/informal education entities (universities, schools, teacher associations, museums, aquaria…)	Ext
Media, social media followers and science communicators	Ext
General public	Ext

One part of the strategy might look at which audiences will be interested in which parts of your organisation or activities. Understanding this may make it easier to prioritize your communication work. This can be done by using a table where each row represents a different target audience and each column represents an aspect or activity of your organisation (see Example 2.2. in Appendix 1). The areas which have the most interest are those to prioritize in terms of communication.

	Activity 1	Activity 2	Activity 3	Activity 4
Audience A	Yes	Yes	No	No
Audience B	Yes	Yes	Yes	Yes
Audience C	Yes	No	No	No

Another way of prioritizing your audiences or stakeholders might be to 'map' them. This can help show you which are the most important and therefore the ones on which you should be spending most of your communication effort. This involves choosing criteria which are important to your organisation and then ranking your different audiences against those criteria. It is often easier to do this analysis with two criteria, so you can highlight the differences between audiences.

Some simple examples of mapping stakeholders include: looking at their influence on policy and resources and their interest in your organisation using the template below (see also example in Appendix 1). In each of the boxes, there is a suggested prioritisation of communication with these audiences. The key players (top right section) are clearly those you want to spend the most time communicating with. It is likely that some of these audiences will become more or less influential and have a greater or lesser interest in your organisation over time and depending on their interaction with you. So it is worth revisiting this type of exercise periodically to see if the priorities are still the same.



2.2.4. Stakeholder survey

A further step is to conduct an external stakeholder survey to gauge what organisations you work with really think of you. Clearly this takes time and resources, but it can be well worth doing – or recommending – as part of developing your communication strategy.

Depending on the size of your organisation and your budget, there are a number of considerations when planning a stakeholder survey.

- **Your stakeholders**: who do you want to ask? Is it specifically donors or supporters, the media, policy makers, politicians, or maybe umbrella bodies and other organisations in your sector. You may feel that your message reaches one group well but struggles to connect with others. This is a good opportunity to test that view.

- **Number of people**: in general, the more people you can speak to and the more opinions you can get, the better. However, consider your timescales and medium (see below) when deciding on the number of people you approach.

- **The medium**: you could do interviews face-to-face, in a focus group setting, or over the phone. This way you will get more in-depth responses but it is time consuming and depends on the availability of your stakeholders. For a speedier way to gather and analyse responses, consider online surveys such as Survey Monkey. You could also use traditional paper questionnaires.

- **Types of questions**: open ended questions (e.g. 'what do you think of…?') will allow respondents more freedom to give their opinion, but closed questions (e.g. 'how would you rate X from 1-5?') will allow you to compare between responses more easily. It's often good to have a balance between open and closed questions. If your survey is online or paper based then be careful not to have too many questions as it may be off-putting to potential respondents. When drafting the questions, make sure they are not too 'leading' and that they are clear and relevant to your audience. Test your survey on friends or colleagues before passing it to real stakeholders.

- **Anonymity:** consider whether or not you want your survey respondents to remain anonymous. If they are, they may be more willing to provide honest feedback. If they're not, you have the obvious advantage of being able to match responses to respondents.

Some organisations wish to monitor the strength of their brand amongst key stakeholders and/or monitor how their organisation is being talked about in the media. You may also want to undertake a follow up survey to review the effectiveness of the communication strategy and if/how this may have altered stakeholders' opinions/perception. There are a number of companies who provide these services – with varying degrees of detail and analysis, or you may consider outsourcing this job to an impartial colleague or student.

2.2.5. Peer analysis

Another useful tool when assessing your current situation is to look at what your peers (organisations operating in a similar field) are doing. This can be a relatively simple exercise where you identify your peers and rank them against certain criteria. Try to be objective when assessing current strengths and weaknesses. You can either give them a score out of 5 or simply comment on the different criteria, using a table as shown below.

	Criterion 1	**Criterion 2**	**Criterion 3**	**Criterion 4**
Organisation A	Score/5	Score/5	Score/5	Score/5
	Comments	Comments	Comments	Comments
Organisation B	Score/5	Score/5	Score/5	Score/5
	Comments	Comments	Comments	Comments

Now try to rank your organisation alongside this. It can be difficult to be objective, so think about asking a range of people in your organisation to give their views. If your organisation has done any stakeholder analysis, include some headline findings here.

	Criterion 1	**Criterion 2**	**Criterion 3**	**Criterion 4**
Your organisation				

3. What are your key messages and communication methods?

Once you have identified your audiences, the next task is to break down your communication objectives into relevant messages for each of those audiences. Start with the audiences that are the highest priority (see Example 3.1. in Appendix 1).

Remember that your messages should be relevant, timely and appropriate to the audience, but it is very important that there is continuity across the messages. It is important that all of your stakeholders understand what kind of organisation you are, so your messaging needs always to link back to your key organisational objectives and values.

For each audience identified in your previous section, you should now indicate the most appropriate channels (electronic, personal or hard copy) for communicating with them (see Examples 3.2. and 3.3. in Appendix 1). These might include an e-bulletin, conference, workshop, leaflet, press release, event – or broader methods such as media and your website.

There are pros and cons to all of these channels, which once again will vary depending on your organisation's needs and resources. Try a simple internal analysis of the channels you have at your disposal to see which ones are the best for getting specific messages to particular audiences. For each audience, there will probably be several appropriate communication channels.

You may also want to include supplementary strategies for your web/online media presence, Press/PR Plans and direct marketing. These will help you go into greater detail about how your organisation plans use these channels to communicate effectively with relevant stakeholders.

4. Constructing your communications implementation plan

Once you have looked at the channels you have, you can begin to construct your communications implementation plan, linking your strategic and communication objectives, target audiences, messages and channels.

You will need to draw up a table that indicates the key communication objectives and the tasks and methods that will address each of your organisation's strategic objectives, and which audience they are targeting. The plan should also include proposed timescales and identify particular milestones within the strategy. This will allow you to measure clear steps towards ultimate goals. There may be specific projects, events or publications that you know will take place and these should be highlighted.

Strategic objective	Comms objective	Target audience	Tasks/methods	Year 1			Key performance indicator
				Month 1	Month 2	etc	
Objective 1	Objective 1.1.	Audience X	Publish newsletter	X	X	X	Number of downloads
	Objective 1.2.	Audience Y	Create new section on website			X	Number of visits
Objective 2	Objective 2.1.	Audience Y	Press conference		X		Number of journalists Number of articles published
	Objective 2.2.	Audience X	Facebook and twitter posts	X	X	X	Number of tweets/retweets/likes
	Objective 2.3.	Audience Z	Presentation at international conference	X			Number of attendees

Rather than having a detailed schedule as in the table above, you may simply want to have a single column that indicates the frequency of your communication tasks, or the date they are required by (as in Example 4.1. in Appendix 1).

While completing this table, keep in mind the available resources (human and financial) to make sure you produce a Plan that is realistic. At least a broad indication of the financial implications should be included in your Plan. You may want to add a budget column to the table above, to allocate specific amounts of funding and human resources to each communications objective.

5. Additional information

5.1. Branding guidelines

Your brand represents the corporate identity of your organisation as perceived by your stakeholders, in particular your prospects and customers. Developing corporate branding is a specialised activity that often benefits from professional services. The communication strategy does not always aim to develop the brand, but does guide and inform its development as well as its implementation.

The communication strategy is about how you would like your stakeholders to perceive and engage with your brand. In order to effectively build a positive brand perception, your activities have to be aligned to deliver a consistent impression of who you are (i.e. how you want to be seen).

You may therefore want to include brand guidelines in your communication strategy or even better, you may wish to develop a separate brand guidelines document and refer to this. The guidelines are to inform what your brand is and how to effectively implement it. This would include a section on how to use the logo(s), straplines, corporate colours and typography and provide a variety of formats and resolutions of images of the official logo(s) to be used. The branding guidelines should be used to ensure that representatives of the organisation use the branding consistently and correctly on all communication and outreach activities.

5.2. Copyright and attribution

Copyright is important - you may need a policy concerning copyright and attribution. At the very least, your communication strategy should highlight that an agreed copyright statement/license should appear on all relevant communication and outreach material (see Example 5.1. in Appendix 1). Equally, if third-party materials are being used, this use should be covered by an appropriate Creative Commons license (see https://creativecommons.org/use-remix/get-permission/), or permission to use should be obtained from the copyright owner. Should you have any trademarks you should include detail of these. Your communication strategy should include guidelines on obtaining written consent for the use of photographs or videos that include people, for example by asking them to sign a media release form.

5.3. Data protection

Within a communication strategy, databases such as mailing lists or those containing survey responses (e.g. stakeholder surveys) are often maintained, which may include personal data. The protection of personal data is taken seriously around the globe and your strategy should include or point towards a data protection and handling policy. Data regulations should also be checked in the country of operation before any personal data is collected, processed and/or stored.

Examples of national and regional data protection legislation include:

- The European Data Protection Directive of 1995, soon to be replaced by a new EU General Data Protection Regulation (GDPR). The regulation was adopted in 2016 and becomes enforceable from 25 May 2018 after a two-year transition period and, unlike a directive, it does not require any enabling legislation to be passed by national governments and is thus directly binding and applicable.
- The UK Data protection Act
- The Australian Privacy Act 1988
- Overview of US sectorial or state laws.

5.4. Crisis plan

If your organisation has a crisis plan, make sure the communication strategy is part of it. If it does not have a crisis plan, it would be advisable to develop one.

6. Evaluating success

Your communication strategy should conclude with a section on evaluation. Evaluation involves assessing whether the plan's objectives have been met as a result of the communication activity. Therefore, evaluations will be valuable only if the objectives are clear and appropriate.

It is important to note that evaluation requires adequate funding, therefore should be taken into account in your communications budget. As a rule of thumb, ten percent of a communication project's budget should be allocated to evaluation.

Questions an evaluation plan might ask include: How will we know if the communication effort is having an impact? Are there different indicators for short-term and long-term impacts? What specific actions/beliefs/outcomes will we monitor as indicators of success? Have we set our goals too high for the communication effort's budget?

6.1. Important steps for conducting an evaluation

- Identify programme goals and objectives
- Define the scope and target audience of the evaluation
- Define methods
- Design instruments and tools
- Collect data
- Analyse data and report

6.2. Evaluation methods

What measurement methods you use depends on what you are measuring. The evaluation should be both quantitative and qualitative. Metrics give an idea of long-term trends and a way to gauge the effectiveness of various approaches. Qualitative feedback from people about how your message impacted them will help you craft more successful messages. It is important to conduct the evaluation before and after you implement your communication strategy or a particular activity so that you can evaluate the impact of your communications against this baseline. The pros and cons of some of the different evaluation methods are provided in Appendix 2.

Qualitative methods can help to get a more in-depth understanding as well as help with interpretation of quantitative data. Qualitative methods include (1) in-depth interviews, (2) focus groups, (3) observations, and (4) analysis of authentic data, user/visitor-created products.

Quantitative methods can be helpful to analyse a large quantity of data and the findings are easier to generalise. Quantitative methods include (1) surveys or questionnaires, (2) objective tests of comprehension, (3) performance tests, (4) website hits, (5) archival research, (6) number of posts/comments/questions to a web or social media site, (7) number of responses to e-bulletins, (8) increases in funding/membership, (9) media coverage (volume, breadth and depth - how often were your key messages mentioned?).

Surveys such as the International Ocean Literacy Survey, which is currently under development, can be useful tools to evaluate changes in knowledge, attitudes and behaviours that have resulted from your communication efforts.

Before analysing quantitative data, it is important that data are in a suitable form for analysis. All survey, assessment results, participation data should be in numeric format and entered into a database or spreadsheet. Preparing qualitative data requires organizing information into smaller categories or 'codes', like labelling thematically. Data can be coded by categories, details of setting, perspectives of people observed, processes, events, etc. Once you have all the data, integrate and synthesise data from different sources to get the big picture and draw conclusions.

6.3. Reporting

If applicable, talk to your funders/management about the types of reports they require – format, structure, frequency, etc. Reports should be clear and concise; provides adequate evidence for claims and enough explanation to make sure readers understand your interpretation of the data. You don't have to report on every piece of data or every finding.

Based on your evaluation report, your communications implementation plan should be reviewed, and if necessary revised, on a regular basis. Your communication strategy should also be reviewed by your organisation's leadership (Board, Steering Committee, etc) as part of its strategic review.

6.4. Top tips for conducting an evaluation

1. Think about what you want to know and be able to say at the end of your evaluation
2. Start early: leave time for aggregating your data; data collection and aggregation can be very time consuming.
3. Start small and keep things simple!
4. Be realistic: Think about measurable outcomes. Consider time and logistical constraints. Concentrate on those for which you can collect data.
5. Consider what data you may already have access to, (i.e. existing data) - institutional data, website hits and tracking data, user-created products and submissions, data from past research or evaluation efforts.
6. Do not limit yourself to one method - consider using multiple methods or mixed method evaluations.
7. Build it in: As you plan your evaluation timeline, try to incorporate the administration of all data collection activities into everyday activities.

Part 2: A template to follow or adapt

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1. Statement of purpose

[Write here why you have developed a communication strategy and what you hope to achieve with it. Describe your organisation's overall vision and core aims and objectives as well as your communication objectives. Suggest how communications can help your organisation deliver on its objectives and promote its brand effectively and consistently]

2. Current situation

[Write here what your organisation does, what its main functions are and where it operates. Use a SWOT or other analysis to identify how your communication efforts can help your organisation to play on its strengths and overcome its weaknesses, while turning threats into opportunities]. Give a detailed description of your main audiences – both external and internal; specify which audiences will be interested in which parts of your organisation or activities; map your stakeholders against different criteria to prioritise between them]

3. Stakeholder messages and methods

[List your stakeholders by order of priority and the relevant messages and appropriate communication channel(s) that you will use for each one. Offer an 'elevator speech' (a short summary used to quickly and simply define a process, product, service, organisation, or event and its value proposition)]

4. Communications implementation plan

[Describe your communications implementation plan with the help of a table listing organisational objectives, communication objectives, target audience, key performance indicators, time line and specific activities. Give an indication of the financial and human resources available to carry out your communications implementation plan, and how these will be allocated]

5. Additional information

*[**Branding:** Detail your organisation's brand and how to effectively implement it, as well as how to access the branding guidelines, including logos, straplines, corporate colours and typography you require to be used]*

*[**Copyright and attribution:** Detail or refer to your organisation's policies on copyright and attribution and include a copyright statement/license that must be used on all relevant communication and outreach materials]*

*[**Data protection:** Detail or refer to your country's laws on data protection]*

6. Evaluating success

[Describe how you propose to evaluate the success of your communications; for example checking progress against milestones, key performance indicators and using metrics of success to measure the impact]

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Appendix 1. Examples

Example Section 1. Statement of purpose

Example 1.1. from KnowHowNonProfit.org:

"This communication strategy shows how effective communications can:
- *help us achieve our overall organizational objectives*
- *engage effectively with stakeholders*
- *demonstrate the success of our work*
- *ensure people understand what we do*
- *change behaviour and perceptions where necessary."*

Example 1.2. from NASA Communication and Outreach Plan:

"A thorough Outreach and Communications Plan is required to inform broader audiences not only of what we are accomplishing and learning, but also why we are doing so and how it is relevant to them."

Example 1.3. from POGO Communication Strategy:

"One of the three pillars of POGO's Mission is to "Work with governments, foundations and industry, to articulate the benefits to society and required funding to build and sustain the [ocean observing] system". Therefore POGO has a strong mandate for communication and outreach with a variety of stakeholders, including the general public. POGO is also a membership-based organization, therefore needs to communicate regularly with its members as well as having a strategy to expand its membership. The number of international organizations is growing and there is often a perception that they have similar or overlapping objectives. It is therefore increasingly important to state clearly what POGO's unique role is and how it differs from other organizations. With limited resources, it is crucial for POGO to have a clear idea of who its stakeholders are, how to prioritise and optimise its communication methods with each of these, and how to allocate its resources accordingly."

Example 1.4. Communication goal and objectives from NASA Communication and Outreach Plan:

Goal

In keeping with NASA and Federal strategic goals, the Earth Science Enterprise's Outreach goal is to provide current and accurate information for access by policymakers and opinion-makers, the public at large and the users of Earth science data that enable contributions to protect and understand Earth.

Objectives

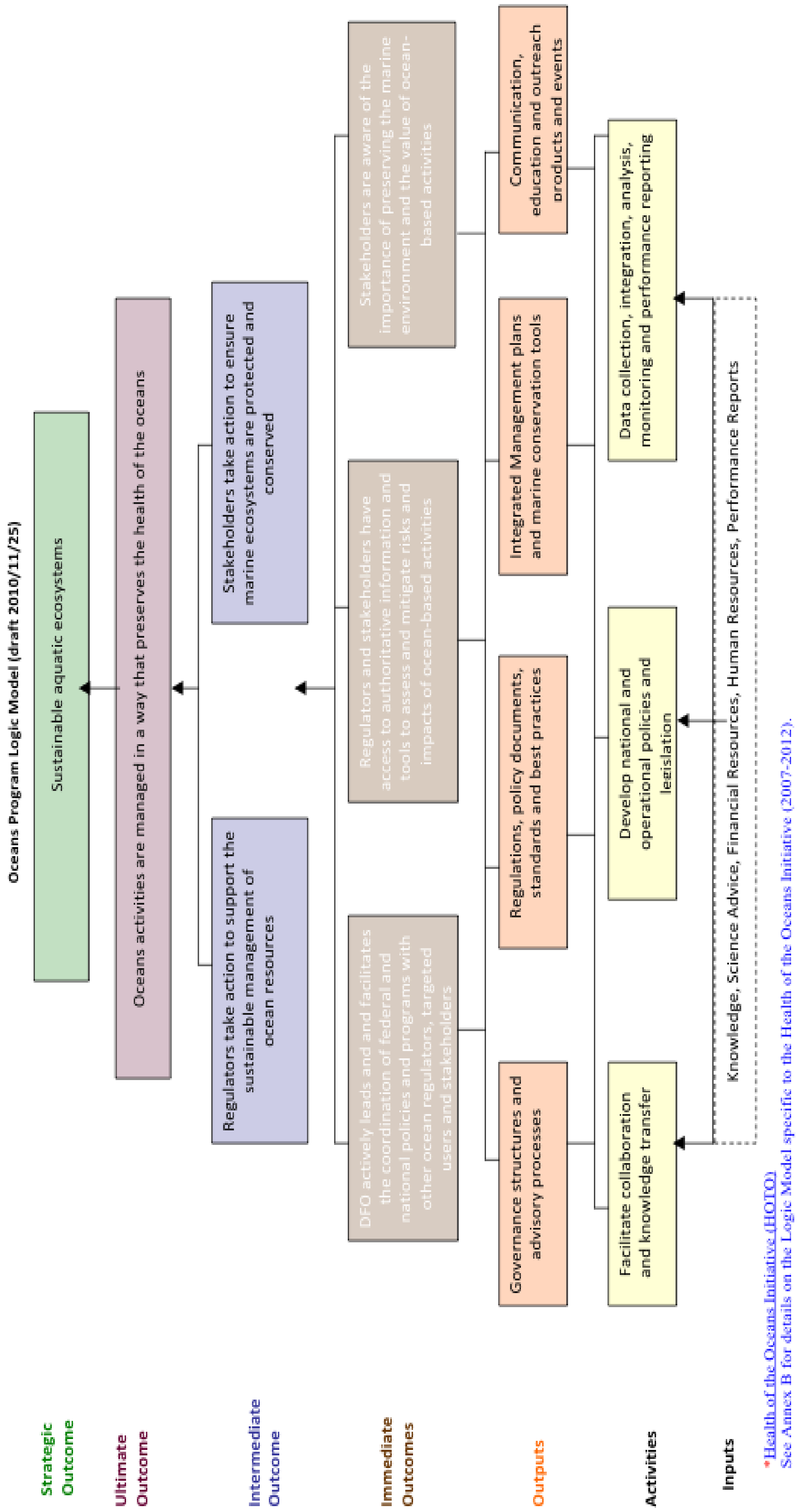
- To communicate our progress, the value and relevance of our results, and our future plans to decision makers and opinion shapers; and
- To increase public awareness of NASA's key role in Earth science and engage them in our missions, discoveries, and applications of our research and development results;
- To improve the capacity of other communicators of Earth science to deliver engaging NASA content.

Example 1.5. Communications objectives from UN Ocean Conference Communication Strategy:

- Raise awareness of the issues confronting the conservation and sustainable use of the oceans, seas and marine resources for sustainable development and solutions to address them
- Raise ocean issues to the top of the global agenda
- Amplify and intensify discussions on solutions to support implementation of Sustainable Development Goal 14
- Highlight commitments and partnerships to address ocean issues
- Highlight best practices and successful initiatives that can be scaled up and replicated.

Example Section 2. Current situation

Example 2.1. HOTO logic model



Example 2.2. Stakeholder vs activities table: POGO example

Stakeholder group	POGO priorities		
	Lead innovation/development of ocean observing system	**Identify/contribute to development of key skills, capabilities and capacities for ocean observations**	**Articulate benefits to society and required funding to build/sustain observing system**
Current member Directors	Yes	Yes	Yes
Member institute Boards	Yes	Yes	Yes
Scientists in member institutes	Yes	Yes	No
Universities/beneficiaries of training programmes	Yes	Yes	No
Potential new members	Yes	Yes	Yes
Partner organizations	Yes?*	Yes?*	Yes?*
Governments (individual)	No	No	Yes
Intergovernmental organizations	Yes	Yes	Yes
Funding agencies	No	No	Yes
Industry	Yes	No	Yes
General public	No	No	Yes
Other communication/ advocacy/ocean literacy groups	No	No	Yes

*The interest of the partner organisations will depend on which type of organisation they are. Some may be interested in all aspects, others in only one.

Example 2.3. Stakeholder mapping diagram

The following example was taken from KnowHowNonProfit.org.

Example 2.4. Competitor analysis

The following example was taken from KnowHowNonProfit.org.

	Website	Media presence	Strength of brand	Spokespeople
Organization A	4/5 – strong colours, easy to navigate, good use of case studies	1/5 – one trade press appearance in last 3 months	3/5 – strong logo and name but not always associated with the range of issues they cover	5/5 – high profile chief exec and use service users well
Organization B	5/5 – well designed, easy to use and well linked to other resources. Good integration with social media outlets	4/5 – regularly called upon to respond to issues relating to the sector. Seem to lack proactive media comments though	5/5 – strong brand and chosen commentator on their area of specialism	4/5 – good high profile spokespeople but limited service user voices

If you are looking at one specific communications area, such as a website, conduct a competitor analysis of that in a bit more detail. For example:

	Design	Usability	Content	Online brand
Organization A				
Organization B				
Organization C				

Example Section 3. Stakeholder messages and methods

Example 3.1. Stakeholders and messages: Example from IODE-OceanDocs:

Stakeholders	OceanDocs Value/Message to Stakeholder **
Marine Science Libraries	• Removing barriers and fostering open access to scholarship • Raising the profile of the library's curatorial and facilitation roles in scholarly communication processes • Raising the profile of the library's role in showcasing research at its parent institution • Demonstrating how the library contributes to advancing the institutional mission and goals • Saves time and resources (not hosting your own) • Trusted thematic global digital repository • Kudos of contributing to Unesco/IOC information product • Global community contribution • Contributing to the open access movement • Persistent Identifier (URI) allocation
Researchers	• Increasing exposure of an individual scholar's forthcoming and already published work (pre-prints and post-prints) • Providing exposure for a scholar's unpublished work (like working papers) • Supporting workflows for managing and disseminating digital content • Offering publishing services for a spectrum of the institution's intellectual output • Attracting audiences for content that is not easily discovered in the corpus of scholarship • Broadening dissemination of academic research to the public • Contributing to the open access movement Compliance with Funder's mandates • Fostering scientific collaboration • Avoids duplication of effort • Build on previous research results • Increased citations • Saves time and resources • Persistent Identifier (URI) allocation
IOC Member States Organizations Partner Organizations	• Showcasing organizations' intellectual output and raising prestige • Providing a source of metrics for organization-level scholarly outputs • Helping the organization to demonstrate its value to its communities and funders • Providing the means to publish and provide discovery and access for all types of intellectual and cultural assets produced at the organization (e.g., working papers, presentations, conference proceedings, etc.) • Saves time and resources • Avoids duplication of effort • Trusted thematic digital repository • Provides return on investment • Persistent Identifier (URI) allocation
Organization & Marine Science Projects End Users (including students and general public)	• Finding out what research is being conducted • Collecting information related to institution-based dissertation topics and honours theses • Networking – finding people in different departments or potential collaborators • Getting to unpublished content not available elsewhere (including data, video clips, learning materials, content related to events, etc.) • Finding institutionally relevant primary source documents for use in teaching and writing • Promoting research done within the institution to institutional colleagues • Free access to science research results
Marine Science Data Centres	• Complementary thematic publications repository • Alternative repository for journal article data • Linked Data possibilities

Policy Makers. Government Agencies	• Supporting national research assessments, science indicators • Demonstrates the societal benefits of publicly funded research • Contributing to the open access movement • Supporting knowledge transfer and economic growth • Provides return on investment
Professional Societies eg IAMSLIC	• Complementary trusted thematic digital repository • Contributing to the open access movement • Coordinating work with existing and emerging subject-based or funder repositories

** Some material from: Calhoun, K. (2014) _Exploring Digital Libraries. Chap 8. The Prospects of Open Access Repositories. Facet.

Example 3.2. Stakeholders and communication methods: from SOOS Communication Strategy

This table indicates the importance of a specific communication method in reaching a specific community. Blue indicates highest priority, consistent efforts to provide or undertake these communication pathways. Green indicates lower priority, produced or communicated on a needs basis.

	Subscription	Website	Newsletter	Workshops/meetings	e-news	Science publications	Programmatic articles	Reporting	Social media	Annual highlights	Other products	Merchandise	Media	Videos/interviews
Individual researchers														
Data Centres and Programmes														
Research Institutes														
International Science Programmes														
National science projects														
Intergovernmental agencies														
National Funding bodies														
International Funding Bodies														
Philanthropic funding bodies														
Policy and management programmes														
Governmental departments														
Shipping														
Tourism														
Fisheries														
Navies														

Example 3.3. Communication messages and methods: Example from POGO's Communication Strategy

Stakeholder	Message	Method
Current member Directors	POGO relies on your contributions to its activities to be successful, particularly in between annual meetings, and there are many benefits to your active participation in POGO	In person, e-mail
Member institute Boards	POGO is an important Forum for your Directors to meet with their peers and to obtain support sustained ocean observations; you should support their participation.	POGO folders, ocean obs brochure
Scientists in member institutes	You should get involved in POGO activities as they could raise the visibility of your research, provide training for your students or opportunities for you to teach abroad or receive students from abroad for training, provide links to other institutions/scientists you could collaborate with, and sets scientific priorities at the global scale.	Presentations in member institutions and at international conferences; booths/posters at international conferences; POGO folders and Strategy.
Universities/beneficiaries of training programmes	POGO can offer a range of training opportunities to help you set up and/or maintain an ocean observing system in your country/region	Presentations and posters at relevant meetings/conferences; distribution of POGO folders; journal publication on past training impact assessment results; encourage NANO network and other alumni to talk about their experiences
Potential new members	POGO is a unique forum for you to meet with your peers from around the world and there are many benefits to joining this consortium.	In-person meetings, POGO folders and Strategy, invitation to attend a POGO Annual Meeting.
Partner organizations	We should work together as we are complementary and can benefit from one another's experience	Presentations at partner organizations' meetings; POGO folders and Strategy; meetings between staff and leadership of POGO and partner organizations (e.g. invite to POGO Plenary/Exec Meetings.

Governments (individual)	We need a global ocean obs system that is fit for purpose. We need to train the next generation of observational oceanographers on a global scale. You must fund ocean observations because they can maximise resources, support the economy, save lives, protect ecosystems and will save you money in the long run.	Through members; Ocean obs brochure
Intergovernmental organizations	We should work together to promote and support ocean observations to governments and at the international level.	Presentations at intergovernmental organizations' meetings; ocean obs brochure; POGO folder.
Funding agencies	You must fund ocean observations because they are important for society	Ocean obs brochure
Industry	You can gain from working with POGO as it provides a gateway to collaboration with its many member institutions from around the world	Presentations/booths at industry association meetings; Members' personal contacts
General public	The ocean is a crucial part of the Earth's life-support system and ocean observations benefit society	Ocean obs brochure
Other communication/ advocacy/ocean literacy groups	We can pool our resources and share our expertise to communicate our common messages more effectively and avoid duplication or conflicting messages.	Ocean Communicators United as a forum for exchange of best practices Blue Planet advocacy group Participation in Ocean & Climate Platform

Example Section 4. Communications implementation plan

Example 4.1. Communication plan extract from IODE/Ocean Teacher Global Academy

Strategic Objective	Communication Strategy	Target Audience	Tasks / Methodology	Key Performance Indicators	Frequency / Required by	Responsible Group/Officer
Promoting the establishment and assisting with the start-up of Regional Training Centres	Develop a sense of ownership of the OTGA Project	RTCs SG-OTGA	a. Create a central website identifying all RTCs and create individual OTGA RTC websites	1. OTGA Website on IODE 2. OTGA webpage on RTC sites	Immediate Mar 2015	OTGA Project Manager; OTGA Technical Manager; RTC Managers
			b. Maintain regular communication mechanisms between SG-OTGA and RTCs	1. Create an OTGA Blog or Newsletter	Immediate Mar 2015	
				2. SG meetings within regions	Annual	
				3. Contributions to the OTGA Website	Ongoing	

Example Section 5. Additional information

Example 5.1. Extract on branding and copyright from the IODE communication strategy:

Communication and outreach material such as Websites, Brochures, Posters, Presentations and Videos should ***always*** *ensure that:*

- *product identification particularly logos for the organization, partners, funding agency support etc are clearly visible*

- *Use Permission is sought for material not covered by a CC BY- SA license or a public free to use copyright statement; attribution should be clearly displayed for all third party material used in communication activities.*

Example 5.2. Guidelines for video and printed material for Earth Science Enterprise (not NASA Educational material):

- All printed materials should bear the NASA logo and the name "Earth Science Enterprise" and the Enterprise's web address.
    - Specific cases of regional or political reasons for using Center names will be evaluated and approved on a case-by-case basis
- All ESE materials will employ, at a minimum, the NASA tag-line "to understand and protect our home planet" but preferably, the entire mission statement.
- Acronyms and agency jargon will be eliminated or severely limited in any written communication intended for external distribution. If acronyms exist, the first case will be defined. Agency jargon will be translated into common English usage.
- An efficient and effective use of resources should be considered when planning to develop new materials for Outreach or participating in events.
    - Sharing of printing and publishing costs being incurred, if any, should be considered if material will be used for cross-cutting purposes.
    - An awareness of existing plans for events or plans for creating new products and material within NASA should be researched prior to commitment of funds.
    - Posters, brochures, lithographs, and CDs should be science-oriented first, and address specific missions in this context. See Outreach Review Process.
- The Office of Earth Science at Headquarters must approve concepts and scripts for all video productions prior to production. Concepts include identification of target audiences and distribution plans. Video products (e.g. scripts, storyboards, and finished production) should follow the Outreach product review process previously outlined in section B.
- Pins, and other premium tokens should not be developed until the subject programs and projects have been officially named.
- All websites should prominently include a link to earth.nasa.gov.

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Appendix 2. Evaluation methods

Framing questions: Identify **key questions** that will guide the evaluation - What do you want to know? Consider: Audience, Resources, and Time.

Organising tools:

- Constructs: Turning evaluation questions into answers requires that you first parse the units into measurable questions or constructs. For example, health is a construct. It can be measured by a series of tests at the doctor's office. Smaller constructs: cardiac health, mental health.
- Indicators: When assessing outcomes it is important to have an idea of what success would look like and how it will be measured. An indicator is a measure of success. Indicators need to be expressed in quantifiable terms (number of events, etc.) Indicators measuring qualitative change (satisfaction, attitude) must be expressed in quantifiable terms such as percentage of teachers experiencing a change in attitude about science teaching or mean change in attitude.

Pros and cons of different evaluation methods

Evaluation method	Pros	Cons
Survey	• Administration is easy • Good for working with large groups • Inexpensive • Reduced chance of evaluator bias • People more familiar/ comfortable with surveys • Tabulation and analysis is • straightforward	• Possibility of low response rates • Items may not have same meaning to all • Limited ability to probe for detail • Never really know who filled out survey • Samples must be carefully selected to ensure statistical meaning
Interview	• High response rate • Can gather more in-depth information • Can tailor questioning to individual • Open ended questions (use probes, pick up non verbal cues) • Reduced chance of evaluator bias • Useful for quotes and stories	• Susceptible to interview bias • May seem intrusive to respondent • Time consuming/expensive compared to other methods • Difficult to analyze and quantify • Smaller sample size
Focus group	• Group dynamics can provide more granular/personal information • Helpful for developing quantitative tools • Provides for sharing and synthesis • Able to get results quickly • Can explore multiple topics	• Somewhat time consuming • Lack of confidentiality • Group members or facilitator may bias responses • High cost per participant • Information may not be relevant for other groups
Observation	• Collect data when/where an activity is occurring • Natural, unstructured setting • Does not rely on people's willingness to provide information • Observer can be either passive or active • Can be combined with other evaluation methods • Can view operations of a strategy or activity	• Susceptible to observer bias • Hawthorn effect – people may perform when they know they're being observed • Does not increase understanding of subject behaviors • Less control over situation • Requires skilled observer • Can be complex to categorize observations

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