



COMMUNICATIONS PLANNING GUIDE
and
**STRATEGIC TOOLKIT FOR COMMUNICATIONS
PLANNING**

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COMMUNICATIONS PLANNING GUIDE

PURPOSE OF THIS GUIDE

This document has been developed to help you create your communications plan. It identifies the desired content of the plan and key issues you need to consider to promote a productivity agenda. It does not present a model plan for you to copy. Rather, it provides approaches that you can adapt to create and execute communications strategies to address your state's needs.

The purpose of the document is to help you think through what it will take to build necessary buy-in and support for efforts to significantly increase the number of college graduates with the resources available. We emphasize the word "necessary." Communications efforts don't need to do everything and engage everyone; they need to be highly focused and do what will work best to advance your state's productivity agenda.

Because each state has different goals and face different circumstances, no two plans will look alike. In fact, we urge you to create communications plans that grow out of your state's goals and address your particular issues and challenges.

The plans may come in different shapes and forms. They can be detailed narratives or a series of tables and charts. But they need to include:

- **A strategic overview** of the communications approach that concisely identifies the basic thrust of the effort;
- **A statement of communications goals and objectives;**
- **An environmental scan** for advancing a productivity agenda, including challenges and opportunities the state may face;
- **An audience analysis** that identifies and prioritizes audiences, considers their needs and concerns, strategizes how to mobilize allies and champions, and addresses what, if anything, should be done to engage skeptics;
- **Core messages** that will help make the case for improving productivity;
- **A summary of strategies and tactics** that will create support and buy-in for the agenda and are mindful of which activities will have the most impact while considering available resources and capacity;
- **An identification of resources and expertise** needed to conduct the work; and
- **A preliminary work plan** that identifies what needs to happen, when, and by whom.

The materials that follow are meant to encourage you to be strategic in your thinking. Your plan does not have to explicitly address every question presented here, but you should consider these questions as you move forward. Additionally, we have developed a Strategic Toolkit that contains resources to help you jump-start or crystallize your thinking in particular areas. Look for references to the Toolkit throughout this document.

We urge you and your state team to work with partners in developing the communications plan. Joint planning is the first step toward creating a broad base of support for the work.

STRATEGIC OVERVIEW

The plan should open with a concise executive summary that gives a sense of the scope of the communications effort and its intended outcomes. It should briefly answer some key questions, including:

- How will the initiative go about doing its work?
- How will this help meet the goals of the project itself?
- Who will be involved in the effort?
- What are key communications strategies that will be followed?
- What is the timeline and proposed staging for this to happen?
- What resources will be leveraged?

GOALS AND OBJECTIVES

The overarching goals of the initiative serve as the backbone for all strategic planning, ensuring that the effort remains focused and uses resources to advance core objectives. Communications goals should be closely aligned with the goals of the initiative. They help focus outreach efforts on key areas of activities that can lead to measurable outcomes needed to build buy-in and support.

In developing goals, you should consider the three to five distinct areas of communications-related work that your state needs to pursue. Possible areas include: advancing legislative change, raising visibility for the productivity agenda, creating buy-in from the field to support changes in policy and practice over the long haul, or building sustainability for the effort.

You have already begun to articulate goals through the communications assessment. See the Communications Goals table on page 13 to analyze the goals you developed in relation to the following questions:

- Are the goals clear and concrete?
- Are they aligned with the overall purpose of the productivity initiative?
- Are they realistic?
- Can you build a strategy around them?
- Will others embrace them or are they too self-serving?

- Do they encourage new approaches and outreach to new audiences or “business as usual?”
- Are they measurable?

Your plan also should consider what success looks like and identify key objectives to be accomplished. Possible indicators include:

- Change in attitudes and opinions, as measured by opinion research;
- Resources leveraged to advance the productivity agenda, such as federal stimulus funds and state philanthropic support;
- Successful changes in legislation or campus/system policy to advance the policy agenda;
- Increase in media coverage focused on issues such as college completion and cost containment; and
- More in-depth media coverage of these issues.

There are also qualitative indicators that demonstrate sustainability and momentum, such as evidence of:

- Strong gubernatorial and legislative leadership, as measured by public statements and actions;
- Campus leaders taking action to improve efficiency and effectiveness and engaging key constituencies;
- Leaders from business and other sectors supporting your efforts in substantive ways; and
- An active and powerful base of allies and champions.

It is often helpful to identify short-term goals for the first year of implementation that can be preliminary milestones. Consider the evidence needed to signal that the initiative is on track to achieve its longer-term goals. For example:

- Strong media coverage for launch event;
- Mention of policy strategies and objectives in governor’s state of the state address;
- Number of briefings with key target audiences;
- Active participation by campus officials; and
- Securing and mobilizing X number of champions.

See page 14 of the Strategic Toolkit to identify Progress Measures and to see what these objectives might look like for stages of the campaign.

ENVIRONMENTAL SCAN

The next core element of the plan is a problem statement that identifies political, financial, workforce, demographic, and other issues that could affect any statewide effort to advance a productivity agenda and build support for the effort. As part of this section,

you will need to analyze what is happening in your state that affects your ability to advance key policy changes.

Your identification of opportunities and challenges in the self-assessment will be particularly helpful in completing this part of your plan. Specifically, note opportunities for leveraging support, such as the amount of political cover anticipated from key leaders outside higher education, such as the governor or legislative leaders.

See page 15 of the Strategic Toolkit for guidance on Leveraging Opportunities and page 16 for advice on Addressing Challenges.

AUDIENCES

Most state teams have built a strong but relatively narrow base of state leadership involvement and now need to extend their circle outward to reach key influencers, such as business and trustees, and campus implementers, such as college presidents, business officers, and – in some cases – faculty. Each audience has different needs, works through diverse networks, and may be best involved at different times in the life cycle of the state’s campaign. You should describe how each audience can affect the success of their productivity initiative and when and how best to involve them.

Page 17 of the Strategic Toolkit provides a guide that helps identify key Audiences perceptions and needs, and how they might be part of the initiative. Page 20 contains information designed to further help you understand the added Value and Risk that key audiences might bring to the table.

With respect to audiences, the communications plan should:

- Use information provided in your communications self-assessment and the Communication *Works* memo analyzing responses to discuss which audiences are most important for advancing the three policy strategies and the initiative as a whole. In identifying audiences crucial to advance particular policy goals, bear in mind how involvement of different audiences might play out in your state. For example, while governors and legislators should play a major role in advancing efforts to reward completion and educate and train in cost-effective ways, these constituencies should be setting expectations, not managing processes.
- Note how key audiences should be targeted and at what level. For example, if college presidents are a crucial audience, note whether you plan to work with all college presidents or a subset of them.
- Suggest what role, if any, faculty should have in the next stages of the initiative, and if there is a role, how they might be involved.
- Discuss potential champions and partner organizations, how much cover they can provide the initiative, how they might be involved, and what, if any, communications channels they can activate. While focus is important, so is diversity. Make sure that the partner base consists of more than higher education insiders and think about how to expand partner base over time. See page 21 of the Strategic Toolkit for a chart to

help identify key Supporters and how they can be most helpful in advancing your communications goals.]

- Identify potential skeptics and what can be done to win them over, or at least recognize and address their concerns. [See page 21 of the Strategic Toolkit for a chart to help identify Skeptics of the initiative, their primary objections, and how to address these concerns.]

MESSAGES

Effective messages are memorable, connect to the big picture and top-of-mind concerns, provide a sense of urgency, simplify complexity, use data wisely, shatter myths, use colorful language, and tell people what you want them to do.

Messages about a productivity agenda might:

- Address why the state must ensure that more citizens complete postsecondary education and how it can do so with the dollars at hand;
- Discuss why the time is right and why the state needs to act now;
- Describe the elements of a productivity agenda and the state's strategy to change rewards, become more efficient, and develop more cost-effective approaches to serve more students.
- Identify the benefits of a productivity agenda and what might happen if the state does not take on these challenges;
- Bust common myths about who needs to go to college, why postsecondary education and training is important, how colleges spend their money, and what productivity really means;
- Suggest why this agenda is doable and what different sectors and individuals can do to make it happen.

These are some preliminary suggestions. See page 23 of the Strategic Toolkit for sample Messages on which you can build.

STRATEGIES & TACTICS

Strategies

A strategy is a plan of action designed to achieve a particular goal. For example, if your goal is to build buy-in from the field to improve the efficiency of campus operations and reinvest savings, strategies might include providing support and tools to help campus leaders make the case for improved efficiency; leveraging existing communications opportunities and available resources; enlisting campus leaders and possibly “unusual suspects” (faculty, union leaders, provosts, others) to make the case; and modeling the kind of engagement needed with faculty and campus officials.

In this section, you should identify key strategies you will pursue to advance your goals and policy objectives. Be creative, and include ideas drawn from successful past initiatives.

Not every strategy will be implemented with the same intensity. The communications self-assessment presented a broad range of strategic approaches that states might consider, including:

Leadership/Coalition Building Strategy – Create coalition of key leaders and organizations to develop, communicate, and advance strategic changes in higher education policy that they influence.

Legislative Strategy – Through information and lobbying, advance strategic changes in laws and regulations governing higher education management and funding.

Research Strategy – Develop new knowledge to inform policymakers and the public of the need for a bigger pool of graduates, how resources and policies are not aligned to produce those graduates, and how colleges are actually spending their resources.

Internet/Social Networking Strategy – Use new media to create dialogue, build community, share information, and spark local action.

Institutional Outreach and Engagement Strategy – Create tools to analyze spending and advance dialogue with deans and faculty to address productivity challenges and promote new efficiencies on campus.

Media Strategy – Use new research and data, high visibility leaders, and efforts by campuses to contain costs to draw media attention to these issues.

Grassroots Strategy – Mobilize advocates and community leaders to raise awareness about the importance of the issue and put pressure on states and institutions to change policies/practices.

The communications plan should: a) identify which of these strategies will be pursued as part of the effort; and b) assign relative importance to each (e.g. percentage of time and resources).

Tactics

Strategy must be animated by smart tactics—individual activities that, taken together, advance a key objective of the initiative. For example, the strategic objective of increasing media attention can draw on a wide range of tactics, including news events, placement of editorials, public release of major reports, and special briefings for reporters and editorial boards.

Following are some “starter” ideas about tactics, many of which were used by one or more MOA states over the course of the Learning Year:

Leadership Engagement

- Host *legislative briefings* to educate legislators individually or as a group about the productivity agenda
- Hold a *legislative seminar* that brings in scholars and experts to provide key legislators with more in-depth knowledge about the productivity agenda and steps they can take.
- Develop *model legislation or regulatory language* to consider when changing the funding formula or creating new incentives for institutions to create efficiencies and reinvest cost savings.
- Create a *legislative information kit* that presents crucial fact sheets and information about the need for a more highly educated workforce and the need to contain costs, helps define what productivity is and is not, answers questions, presents the changes that need to be made and the rationale for them, and identifies supporters of the effort.
- Promote *gubernatorial engagement to catalyze action*, such as drafting *op-ed pieces* in key newspapers to spread awareness or using the bully pulpit to speak out about the need to educate more citizens at a reasonable cost.
- Launch a *statewide listening tour* to solicit opinions and suggestions from key stakeholders.
- Publish *op-ed pieces* and *advertorials* bylined by business leaders that urge passage of particular legislation.

Media Outreach

- Host a *launch announcement* to kick off the initiative and build excitement.
- Host a *media briefing* to inform education journalists about the productivity agenda, present potential story angles, and establish initiative leaders as experts to turn to.
- Host *news events* to announce the release of new data and policy reports about how the state can address its workforce needs and keep higher education affordable;
- Set up *editorial board meetings* to educate editors of key media outlets,
- Reach out to *student newspapers* to encourage more coverage or commentary of productivity issues on campus.
- Write and place *op-ed pieces* bylined by leaders with influence to weigh in on key issues of importance.
- Establish an *opinion leader echo chamber* in which prominent leaders from government, business, philanthropy, higher education, and economic development draft op-ed pieces and appear on radio and television to discuss the importance of productivity in higher education.
- Create a special *Sunday paper insert* about the state's needs for more highly educated workers and the importance of postsecondary education.
- Host a *debate on state public radio or public TV networks* about whether more citizens need to go to college and whether college can be made more affordable.

This list is illustrative rather than exhaustive. To help your planning, see page 25 of the Strategic Toolkit to review a broad range of Strategies and Tactics that might align with communications goals and measures of success.

RESOURCES

Building buy-in and support for the initiative will require resources, including financial support and communications expertise.

If selected, your state will receive \$2 million over four years and can use Lumina resources to support their communications activities. If you want to carve out 10 to 50 percent of this money for communications, you will be free to do so. But whatever is proposed has to make sense in light of your overall goals. For example, 50 percent may be the right amount because you may plan a major education campaign, but it may be too much if it doesn't complement what you are trying to do or does not seem well thought out.

In addition, Lumina will engage a firm to handle the overall communications for the effort. If you hire a firm to help you, that firm will need to coordinate/receive input from the firm that is leading the initiative's communications effort.

You should identify the overall financial resources required to put their plan into action, how these resources will be distributed across a variety of outreach areas, and additional expertise they will need. Specific questions to answer include:

- How much money do you estimate will be required for the overall communications effort, including support beyond the grant itself?
- What external expertise do we need?
- What firms will help support your efforts and what is their related experience in communications efforts in higher education or to improve productivity/outcomes in other fields?
- How might you use the Opportunity Grants from Lumina Foundation (\$2 million over 4 years) to pay for communication outreach?
- What proportion of the grant would you allocate to state communication outreach generally over the four year period?
- How will these dollars be spread among the following areas? *(Please note that states may not do all of these things and some of these areas may overlap. This is designed to give you a framework for planning.)*

_____ % Opinion Research, Strategic Communications Counsel, Media Relations
_____ % Outreach
_____ % Partnerships and Development
_____ % Technology, Web Development, E-outreach
_____ % Events, Publications, Dissemination, Advertising, Graphics, Design
= 100%

WORK PLAN

Work Plan

You should identify who will be involved in carrying out the communications plan and responsible for the major activities. See page 30 of the Strategic Toolkit for a sample Preliminary Work Plan with a timeline and responsibilities table.

Staging

Communications initiatives and campaigns play out in phases, with different phases focused on different objectives. Some of the phases may overlap with each other, because it takes time to set up and deliver different parts of the agenda.

For example, Making Opportunity Affordable has begun with a Learning Year that has allowed state teams to build a leadership team, identify and advance key policy priorities, develop a long-term communications strategy, and launch initial support and case-making activities. The Implementation Year might begin with a launch phase that could include further case-making, development of communications materials, expanding leadership support to a larger group of stakeholders, a launch event, and media outreach. This phase might naturally lead into an agenda building or partnership development phase, in which allies are brought together and aligned in common purpose. This would precede legislative action or campus engagement phases.

In your communications plan, you may want to indicate the different stages or phases of your effort to identify how the work will unfold over time. See page 32 of the Strategic Toolkit for an example of a Staging chart.



STRATEGIC TOOLKIT FOR COMMUNICATIONS PLANNING

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Introduction

In developing your communications plan, your state team can benefit from using some of the tools employed by communications professionals to develop campaigns aimed at changing public policy and building public will.

In many cases, a table or chart is worth a thousand words, particularly when it comes to analyzing audiences; aligning goals, strategies, and tactics; presenting a budget; or indicating how the complex parts and multiple phases of a campaign will unfold over time. These are the crucial elements of a strategic communications plan. We emphasize that communications efforts don't need to do everything; they need to be highly focused and strategic.

This toolkit provides a diverse sampling of templates, tables, and examples. We encourage you to fill out or adapt these forms, or others of your own making, to complement the narrative component of your plans. These tools, combined with the advice and ideas presented in the communications planning guide and the results of your communications self-assessment, provide the building blocks you need to create a solid strategy for advancing a productivity agenda in your state.

COMMUNICATIONS GOALS

Developing a plan starts with articulating clear, concise, and measurable goals that are appropriate for your target audiences and are aligned with the core policy elements of your agenda. Question 1 in your communications self-assessment provided a starting point for that part of the process. The next step is to refine your goals and add information about progress/success measures. The table below, along with CommunicationWorks' feedback on your self-assessment, is designed to help you do that.

Communications Goals and Indicators of Success

Communications Goals	Indicators of Success
<p>EXAMPLE: Goal 1 <i>Raising Visibility for Productivity Agenda</i></p>	<ul style="list-style-type: none"> • <i>Recognition by the public that postsecondary education is important and among higher education that it can be delivered more efficiently and cost-effectively</i> • <i>Broader understanding about and acceptance for a productivity agenda among state leadership, higher education, and other target audiences</i> • <i>Increased media coverage about key issues related to degree attainment and cost containment</i> • <i>Ongoing gubernatorial, legislative, and business leadership for the issue</i> • <i>Increasing use of best practices and expansion of model institutions</i> • <i>Increased dialogue among campus leaders about measures of productivity and efficiency and reinvestment strategy</i>
<p>Goal 2</p>	
<p>Goal 3</p>	
<p>Goal 4</p>	

Different measures and milestones may be appropriate for different stages of your initiative. Early measures may be more process-oriented, focusing on whether the launch was effective and how many people and champions have been engaged. Over the long haul, the success indicators may provide solid evidence of attitudinal, behavioral, and legislative change. Following is an example of how you might organize the effort to reach key objectives over time, although your measures might be more explicit and state specific.

Progress Measures

Short Term (2009-10)

- Strong media coverage for launch event.
- Mention of policy strategies and objectives in governor's state of the state address.
- Build successful communications partnerships to share information across networks.
- Number of briefings with key target audiences.
- Active participation by campus officials.
- Securing and mobilizing X number of champions.

Intermediate Term (2010-11)

- Resources leveraged to advance the productivity agenda, such as federal stimulus funds and state philanthropic support.
- Strong gubernatorial and legislative leadership, as measured by public statements and actions.
- Campus leaders taking action to improve efficiency and effectiveness and engaging key constituencies.
- Leaders from business and other sectors supporting your efforts in substantive ways.
- An active, diverse, and powerful base of allies and champions, and indicators that other groups support and are working to advance the agenda.

Long-Term (2012 and beyond)

- Change in attitudes and opinions, as measured by opinion research.
- Successful changes in legislation to advance the policy agenda.
- Widespread use of best practices on campus.
- Increase in media coverage and greater depth in coverage on issues such as college completion and cost containment.

ENVIRONMENTAL SCAN

Leveraging Opportunities

One of the most important things your initiative can do to build buy-in and support is to effectively leverage emerging opportunities. Ask yourself the following questions:

- Is the governor willing to invest some of his/her political capital on this issue?
- Will your state be using federal stimulus dollars to support your agenda?
- Is there new legislation about to pass or a new commission developing recommendations that are pertinent to advancing a productivity agenda?
- Is a new research study about the state’s workforce needs on the horizon?

You identified some emerging opportunities in Questions 12-22 of the self-assessment, which gives you a head start on developing some possible strategies and ideas about how to leverage them to advance the productivity agenda.

Opportunity	Ways to Capitalize
<p><i>List emerging opportunities that you rated as a 3, 4, or 5 when you filled out the communications self-assessment.</i></p>	<p><i>List strategies or activities that might be worthwhile to take advantage of the opportunities. These might range from ideas about how to move forward to specific actions, such as meetings, events, development of tools and materials, coalition building, media outreach, or other activities.</i></p>
<p>EXAMPLE: New research is in the pipeline that will draw attention to issues surrounding higher education.</p>	<ul style="list-style-type: none"> • Meet with researchers in advance of release to understand how report can advance productivity agenda; • Offer to organize news event, if closely aligned with researcher(s), featuring research team, state officials, business leaders, higher education leaders or create seminar for state leaders to discuss the impact on the state; • Host briefing for legislature; and • Draft and work to place op-ed bylined by champion of productivity agenda.

Addressing Challenges

The following chart can help you assess current challenges and brainstorm possible solutions. Review your answers to Questions 23-38 of the self-assessment as a starting point for completing this part of the analysis.

Barrier	Possible Solutions
<i>List key barriers you identified on the communications self-assessment.</i>	<i>List strategies or activities that may be effective in overcoming or mitigating barriers.</i>
<p>EXAMPLE: Lack of awareness about what productivity means</p>	<ul style="list-style-type: none"> • Develop/test messages, tools, and informational materials that define what productivity is/is not, what it looks like on campus and in the systems office, and why it matters. • Conduct focus groups and opinion research to determine best ways to discuss key productivity issues with key audiences. • Create statewide efficiency council comprised of key stakeholders to identify best practices and discuss productivity issues. • Engage key audiences in discussing strategies for how the state might measure productivity. • Honor/reward institutions that are doing the best job in enhancing productivity in higher education. • Release research report(s) defining key aspects of the productivity challenge (e.g., state’s need to produce more degrees, contain cost and encourage efficiency/reinvestment, and how the state is or is not delivering low-cost higher education). • Develop tools to help institutions provide more transparency about what they spend.
<p>EXAMPLE: Organized opposition from faculty members and institutional leaders</p>	<ul style="list-style-type: none"> • Bolster support from other key leaders, including business officials. • Identify pockets of support among presidents and faculty and meet with these groups to develop strategies to build greater understanding. • Host “Difficult Dialogues” sessions across the state. • Create tools and materials that can help presidents engage faculty and administrators in discussions about advancing the productivity agenda. • Identify what the benefits of the productivity agenda will be and the cost of doing nothing.

AUDIENCES

This section provides a broad range of information and tools, some of which may overlap. Use those that you are most comfortable with and think will provide the most benefit. Public Agenda has done significant research on key audiences perspectives on higher education issues:

- *Squeeze Play 2009: The Public's Views on College Costs Today*
Survey shows Americans see higher education as essential, but harder to afford. Click here to view the report.
- *The Iron Triangle: College Presidents Talk About Costs, Access, and Quality*
More than two dozen college presidents warn that cutting costs inevitably affects quality and student access. Click here to view the report.
- *Campus Commons: What Faculty, Financial Officers and Others Think About Controlling College Costs*
While financial officials say colleges aren't producing enough graduates, faculty are concerned with the pressure to lower standards in order to retain students. Click here to view the report.

The following table was developed by Communication**Works** as part of an audience mapping process based on national information, data, and trends from our experience working with states. You can use this table to spark a discussion with your group about the needs of these audiences to identify what the real concerns and potential for action might be in your state.

Audience Concerns, Needs, & Potential Actions

Audience	Concerns and Needs	Possible Action
State Policymakers	<ul style="list-style-type: none"> • Immediately concerned with how to balance budgets and respond to historic economic downturn. • Growing concern about the ability to finance higher education in the future given rising costs in other areas (health care, social welfare and criminal justice, and K-12 education). Need long-term solutions to make all areas more productive. • Seek better results, increased accountability and transparency, and return on investment, but forced by legislative process and budget cycles to address problems in financing by tweaking existing formulas. Lack time to think about significant changes, new incentives, and other strategies to improve productivity. • Feel enormous frustration that state higher 	<ul style="list-style-type: none"> • Align higher education financing and other policies with state goals to ensure that the state produces more graduates with the resources at hand. • Pass desired legislation and regulations that will help transform the system. • Develop creative strategies to ensure adequate resources and make good investments.

	education institutions are unresponsive and lack accountability.	
College Presidents	<ul style="list-style-type: none"> • Believe colleges can and should be more accountable and more efficient and that they have done what they can do in this area. • Say that if the United States is serious about remaining competitive, and about providing education for a new generation of students, the nation should be willing to make the investments needed to pay for it. • Believe that there is an inherent trade-off between quality, access, and cost. Cutting costs in higher education must eventually lead to cuts either in quality or access. 	<ul style="list-style-type: none"> • Lead dialogue on campus about productivity issues and what colleges can do to support changes. • Take leadership on campus to explore what changes can be made in course redesign, reduction of duplication of courses and programs, better use of facilities and scheduling, and other changes that have worked in other places. • Work with state leaders to consider what changes will be successful.
The Public	<ul style="list-style-type: none"> • Recognize the importance of higher education and respect its role as the gateway to the middle class for millions of Americans. • Concerned that prices are rising to a breaking point where they cannot afford college anymore, or to where students will be forced to “trade down” to cheaper institutions and take longer to graduate. • Believe that we can improve quality while advancing opportunity and containing costs. Majority say that colleges could spend a lot less and still maintain a high quality of education, and that colleges could take in a lot more students without affecting quality or increasing prices. • Sizable minority believes that waste and mismanagement is a factor in driving up the cost of college. 	<ul style="list-style-type: none"> • Understand the value of higher education in a knowledge economy and in a rapidly changing world, and ensure that more students have opportunities to enter and graduate. • Advocate for colleges to do a better job graduating the students they enroll. • Put pressure on colleges to contain costs and be more transparent about what they are spending.

<p>Business and Opinion Leaders</p>	<ul style="list-style-type: none"> • Believe increasingly that higher education is too bureaucratic and resistant to change, and that colleges needed to become leaner and more efficient. • Concerned about their ability to hire well-educated workers who have skills they need to analyze information, communicate effectively, and solve problems. • Say that they pay too much for remediation and training to give their workers the skills and knowledge they should have already gained in college. • Believe that higher education will not be able to maintain quality or produce needed graduates without significant transformation (in culture, organization, and means of delivery). 	<ul style="list-style-type: none"> • Help draw attention to vital economic interest in bolstering student success and containing cost. • Provide support and cover for higher education leaders and elected officials who take bold policy action. • Propose bold policy changes designed to expand the conversation about possible options.
<p>Faculty and Staff</p>	<ul style="list-style-type: none"> • Major issue is preparation of students who come to college. • Concerned that they will bear the brunt of productivity changes through larger workload, removal of tenure. • Believe in high standards and set high expectations, and have strong allegiances to their own disciplines. • Recognize their own responsibility in helping students succeed and the limits of what they are capable of accomplishing. • Accustomed to the current way time, resources, scheduling, etc. are allocated. Would be concerned about changes to status quo, unless they help initiate those changes. 	<ul style="list-style-type: none"> • Understand that productivity means something different than indiscriminate budget cutting and an attack on tenure but rather using resources more strategically to improve student success. • Participate in building and buying into agenda and participating in reinventing course delivery on campus. • Participate constructively in debate about policy options, rather than simply voicing opposition.
<p>Students</p>	<ul style="list-style-type: none"> • Want to ease economic burden on themselves and their parents for paying for college. • Want to graduate and earn degree that leads to further learning and rewarding and satisfying careers. • Want a high quality education for a 	<ul style="list-style-type: none"> • Become thoughtful advocates for greater smarter spending and addressing student needs. • Communicate to policymakers and

	<p>reasonable price.</p> <ul style="list-style-type: none"> • Want to know more about what their tuition and fees are paying for. • Need environment that will foster personal growth and self-evaluation as well as building a sense of community. 	<p>media the need for cost containment and for doing better in graduating more students.</p> <ul style="list-style-type: none"> • Network with faculty, administrators, and trustees who share their points of view and support students.
Media	<ul style="list-style-type: none"> • Want inside information from trusted sources and prominent decision makers. • Devour reports that provide new data, strong messaging, identify gaps, and solutions. • Want proof that changes will work. • Want fair and equal treatment among competitors and want good sources of news, information, and analysis. • Thrive on debate and controversy. 	<ul style="list-style-type: none"> • Serve as a conduit for getting information and building support from the public and leadership. • Be valued partner who will draw attention to new information and research.

Value and Risk Analysis

The following table is designed to help assess the pluses and minuses associated with they key audiences for your efforts. This is an important part of the process, as it helps you to figure out how particular audiences should—and should not—be engaged.

Audience	Added Value	Potential Risks
EXAMPLE: Two-Year College Presidents	<ul style="list-style-type: none"> • Provide support for expanding low-cost options with policymakers and other sectors of higher education. 	<ul style="list-style-type: none"> • If effort does not recognize that institutions are already stretched beyond their limits, community college presidents might be an obstacle.
EXAMPLE: Racial/Ethnic Minority Communities	<ul style="list-style-type: none"> • Focus much-needed attention on fastest-growing populations most underserved. • Address economic development issues in communities. • Generate additional advocates, media visibility, and political support. 	<ul style="list-style-type: none"> • Must address real needs of this audience or will be seen as manipulative or exploitative.

Identification of Supporters

This table can help you identify key supporters and how they can be most helpful in advancing your communications goals. Some types of support stakeholders can provide include:

- Advancing legislation or new policies;
- Making public statements; bylining articles;
- Hosting joint events and meetings; speaking at events;
- Disseminating information through their networks; and
- Conducting policy analyses.

Group/Org. <i>Which stakeholder groups or organizations are most important for promoting a productivity agenda?</i>	Leader(s) <i>Who within this group can play a visible/significant role?</i>	How They Relate <i>What issues are they promoting that connect with a productivity agenda?</i>	How They Can Help <i>What can these individuals and groups do to provide momentum for the productivity agenda?</i>
EXAMPLE: Business Community (Chamber of Commerce, Skills Commission, Business Roundtable)	Joe Smith, Chamber Margaret Jones, Governor's Business Task Force	<ul style="list-style-type: none"> • Increasing job-ready skills for graduates • Need for more highly skilled workforce • Concern about rising costs for retraining 	<ul style="list-style-type: none"> • Bring together key leaders • Meet with trustees and lawmakers to discuss long-term funding of higher education and need to improve • Byline op-eds

Identification of Skeptics

Not everyone will embrace the initiative. Some may oppose the effort and many may simply be skeptical about whether a productivity agenda is even possible. This table can help you identify these audiences, the basis of their concerns, and how these concerns might be addressed or answered.

Group/Org. <i>Which key audiences have expressed or are likely to express the most concern?</i>	Issues <i>What are their concerns or objections?</i>	Strategies <i>How can your coalition address or answer those concerns and objections?</i>

<p>EXAMPLE: Public flagship/ research universities</p>	<p>May see productivity initiative as a threat to their enrollment and funding support.</p>	<ul style="list-style-type: none"> • Identify leaders of these institutions who support key aspects of the agenda and create opportunities for them to share their perspective (e.g. op-eds, public forums). • Create and fund substantive roles for research universities to participate in the initiative. For example, research institutions could lead R&D efforts to develop new and more cost-effective models for delivering academic programs and services. • Provide incentives for these institutions to be an integral part of the policy agenda to produce more degrees more cost-effectively. • Identify and recognize innovative programs and policies at these institutions.
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MESSAGES

The following messages, mostly national in scope, can be adapted using analogous data from your state, including job growth, unemployment projections, and workforce development data; higher education trends; and the potential social and economic costs of inaction for your state.

The Productivity Challenge

The nation is facing unprecedented economic decline and insecurity. Unemployment in [name state] is approaching levels unseen in a quarter century. Our nation's financial system has verged on collapse. The auto and banking industries are in financial jeopardy. This crisis demands a turnaround plan that boldly marshals American talent.

Today, every state faces the challenge of working harder – and faster – to educate enough college graduates to sustain the vitality of its local communities and economy. To meet workforce demands alone, research shows the United States will need one million more graduates a year than it is on track to produce during the next 16 years.

Without a major overhaul, our higher education system is simply too costly to meet this challenge.

A generation ago, the United States had the best-educated population in the world. Today, the nation is in a four-way tie for 10th for the percentage of its population ages 25 to 34 with a college degree. The good news is that educating a greater share of the U.S. population is not beyond reach. The nation already spends at least twice as much per student as the average industrialized nation and over \$5,000 more per student than Canada, the next largest-spender.

Better investment, with a focus on productivity, should generate better results.

The Need for More Highly Skilled Workers

Our workforce requirements are changing dramatically, and [name state] must ramp up its degree production to meet its workforce needs and compete with other nations.

There is a growing gap between the supply of and demand for college educated workers. Since 1980, the increase in demand for college educated workers has been almost twice as large as the increase in the supply of such workers.

Most new jobs will require higher skills and some postsecondary education. Jobs that require higher credentials are growing more than twice as fast as those that require only on-the-job training.

Most existing jobs will require higher skills as well. Seventy percent of the increase in postsecondary requirements for jobs in the past 30 years has not come from new jobs, but from existing jobs demanding more education, according to Georgetown University labor economist Anthony Carnevale. Within five years, he says, almost two-thirds (63 percent) of jobs will require some form of postsecondary education.

Many of our most educated workers will be leaving the workforce. Workers over 55 today constitute almost a third of all the postsecondary-degree holders in the American workforce. Yet the well-educated Baby Boom population is on the verge of retirement and will be replaced by a new generation of workers who – as a whole – have much less education.

The Need to Transform Our Higher Education System

Our existing higher education system will not produce the number of highly educated citizens and workers we need at a cost that taxpayers, students, and families can afford. That is because:

- *Current methods of funding for public higher education are not sustainable.*
- *Changing demographics require that institutions be more student-focused and offer more flexible courses and programs.*

- ***The current pipeline for students moving through the higher education system is broken and must be repaired.***

Call to Action

The need for transformational change is obvious to anyone who follows global trends. President Obama has called for a restoration of U.S. leadership in degree attainment. Through Making Opportunity Affordable, like-minded organizations work within states to recalibrate higher education spending to graduate many more students than the nation is on track to educate. The initiative relies on three mutually reinforcing pathways to provide greater opportunity and mobility for students.

1. ***Increase and Reward Completion.*** States should begin setting aside significant portions of their higher education budgets to reward institutions for students who complete courses and graduate in greater numbers at lower per-unit expense. States also should pay colleges and universities more for serving students who will comprise a growing share of the American labor force, including students of color, first-generation students, students from low-income families and working or unemployed adults.
2. ***Generate and Reinvest Savings.*** Spread widely, efficient and cost-effective academic and administrative approaches can free resources for serving many more undergraduates. Fewer wasted credits, better use of tuition policy, campus space, fewer building projects, and outsourcing operations—all of this and more is needed to make the best use of available dollars.
3. ***Educate and Train in Affordable Ways.*** Higher education is a prime candidate for innovation, such as entirely new ways of cost-effectively delivering degree programs. High quality education could be delivered through a variety of ways using a variety of channels that would free resources to offer non-traditional students new opportunities. Whether public or private, nonprofit or for-profit, two- or four-year, higher education institutions must become more nimble, efficient and responsive to the needs of students and American society.

What Will Happen if We Fail To Act?

College costs will become prohibitive. If college and university costs continue to increase at current rates, educating the number of students we need to be globally competitive will require an additional \$31 billion annually by 2025. That would mean a 40 percent increase in state appropriations – or tuition increases of almost 50 percent at four-year public colleges and almost 110 percent at two-year public colleges, putting a degree beyond the reach of even more students.

Educational attainment rates will rapidly decline. If current student success rates continue through 2020, the number of citizens aged 25-64 without a high school diploma will increase by seven million, compared with an increase of only five million in the number of citizens with an associate’s degree or higher.

Higher levels of unemployment will become the norm.

The nation will lose tax revenues required to make government work for all of us and to provide a safety net for the poor. People with some form of postsecondary education contribute almost three-quarters of all income tax receipts.

Already high rates of incarceration will continue to climb. Imprisonment is almost three times more likely for people with a high school diploma or less than for people with some form of postsecondary education.

The physical health of Americans will suffer and the quality of civic life will erode. In the words of Ben Bernanke, chairman of the Federal Reserve: “A substantial body of evidence demonstrates that more-highly-educated individuals are happier on average, make better personal financial decisions, suffer fewer spells of unemployment, and enjoy better health. Benefiting society as a whole, educated individuals are more likely to participate in civic affairs, volunteer their time to charities, and subscribe to personal values – such as tolerance and an appreciation of cultural differences – that are increasingly crucial for the healthy functioning of our diverse society.”

STRATEGIES AND TACTICS

Strategies are the critical link between your goals and measurable outcomes. Just as the choice of tools can make or break a construction project, choosing the right strategies can mean the difference between meeting your goals and falling short – or worse. Strategies must be animated by smart tactics – individual activities that, taken together, advance a key objective of the initiative. For example, a strategy designed to increase media attention can draw on a wide range of tactics, including news events, placement of editorials, public release of major reports, and special briefings for reporters and editorial boards. Strategies and their tactics must be properly sequenced to ensure that they build on one another to achieve your goals.

Merge your refined goals and success measures with your responses to Questions 42-48 on your self-assessment and CW’s feedback on those responses – do these pieces fit together? If not, where are the gaps?

Also, consider the lessons you outlined in Question 41 of the self-assessment. Which of those may be most applicable here?

Following is a table that is designed to help you merge strategies and tactics and evaluate how well they are aligned to goals and whether they can be measured.

Putting It All Together

Goal	Core Strategies	Tactics	Measures of Success
1. Advance legislative change	Better understand attitudes of key stakeholders to identify support.	<ul style="list-style-type: none"> • Conduct leadership interviews that ascertain the attitudes and opinions of representative leaders within or across key audiences. 	<ul style="list-style-type: none"> • Broader understanding about and acceptance for productivity agenda among state leadership
	Educate leaders about key issues and answer their questions.	<ul style="list-style-type: none"> • Host legislative briefings to educate legislators individually or as a group about the productivity agenda. • Offer a legislative seminar that bring in scholars and experts to provide key legislators with more in-depth knowledge about the productivity agenda and steps they can take. 	<ul style="list-style-type: none"> • Bills advance that support state efforts to reward completion
	Create tools and materials to demonstrate what productivity means and possible solutions.	<ul style="list-style-type: none"> • Create a legislative information kit that presents crucial fact sheets and information about the need for a more highly educated workforce and the need to contain costs, helps define what productivity is and is not, answers questions, presents the changes that need to be made and the rationale for them, and identifies supporters of the effort. • Develop model legislation or regulatory 	<ul style="list-style-type: none"> • Same as above

		<p><i>language</i> to consider when changing the funding formula or creating new incentives for institutions to create efficiencies and reinvest cost savings.</p>	
	<p>Develop peer-to-peer communications in which leaders talk to other leaders and state their commitment.</p>	<ul style="list-style-type: none"> • Encourage pro-productivity lawmakers to talk with their peers. • Promote <i>gubernatorial engagement to catalyze action</i>, such as drafting <i>op-ed pieces</i> in key newspapers to spread awareness or <i>using the bully pulpit</i> to speak out about the need to educate more citizens at a reasonable cost. • Establish an <i>opinion leader echo chamber</i> in which prominent leaders from government, business, philanthropy, higher education, and economic development draft op-ed pieces and appear on radio and television to discuss the importance of productivity in higher education. 	<ul style="list-style-type: none"> • Ongoing gubernatorial, legislative, and business leadership for the issue
	<p>Encourage feedback from stakeholders who may have issues with the agenda.</p>	<ul style="list-style-type: none"> • Launch a <i>statewide listening tour</i> to solicit opinions and suggestions from key stakeholders. As part of this effort, officials could invite leaders of faculty organizations, parent, business, and student groups to participate in an <i>open dialogue with state leaders</i> to discuss what productivity looks like from their perspective and to discuss/respond to strategies about what the state can do. 	<ul style="list-style-type: none"> • Increased dialogue among campus leaders about measures of productivity and efficiency and reinvestment strategy
	<p>Leverage business support.</p>	<ul style="list-style-type: none"> • Publish <i>op-ed pieces</i> and <i>advertorials</i> bylined by business leaders that urge passage of particular legislation. 	<ul style="list-style-type: none"> • Increased media coverage about key issues related to degree attainment and cost containment.
<p>2. Create buy-in for improved efficiency on campus</p>	<p>Identify where key audiences on campus stand.</p>	<ul style="list-style-type: none"> • Conduct baseline and follow-up <i>surveys</i> to identify attitudes to track change over time. • Conduct <i>focus groups</i> of key target audiences to understand more about their concerns and views, what motivates them, and their reaction to specific policy changes and agendas. 	<ul style="list-style-type: none"> • Show attitudinal changes over time. • Pockets of faculty and administrative support begin to emerge and expand.
	<p>Create forums and events to promote better</p>	<ul style="list-style-type: none"> • Host <i>Difficult Dialogue discussions</i> between presidents and faculty to help discuss and sort out challenging issues. 	<ul style="list-style-type: none"> • Trustees develop dialogue with

	understanding of issues/exchange.	<ul style="list-style-type: none"> • Create a <i>meeting-in-a-box</i> for presidents to discuss productivity with campus administrators that includes casemaking presentation materials, video footage, and other tools. • Convene <i>regional forums</i> bringing together presidents, budget officers, and other campus representatives to discuss productivity issues. 	<p>presidents.</p> <ul style="list-style-type: none"> • On-campus constituencies gain greater understanding of productivity issues and their impact on the state and higher education.
	Create a mechanism to ensure campus involvement in policy decisions.	<ul style="list-style-type: none"> • Establish a <i>statewide efficiency council</i> to suggest ways to provide cost savings on campuses and reinvest the resources. 	<ul style="list-style-type: none"> • Best practices that promote efficiency expand and deepen on campuses. • Campuses contribute new approaches.
3. Create greater sustainability over time	Enlist support from the business community to continue to focus on this agenda long after leaders change.	<ul style="list-style-type: none"> • Host a <i>statewide business forum</i> convened by the Governor to bring business leaders together to discuss workforce needs and strategies to create more students postsecondary graduates with the resources at hand. • Partner with college leaders and business and economic development organizations to form a <i>State Task Force on Postsecondary Education for Economic Success</i>. The task force can release a <i>task force report and follow-up actions</i> to address state economic and workforce development needs and advance the productivity agenda. • Launch a <i>Better Jobs for [Name State]</i> stimulus initiative – a business-led campaign focused on producing more postsecondary graduates across a broader segment of the population. 	<ul style="list-style-type: none"> • Create robust support from business community to increase demand on colleges for more graduates.
	Identify federal/state funding that could possibly support initiative beyond Lumina grant.	<ul style="list-style-type: none"> • Identify potential public sources • Consider public/private partnerships and host meetings with state officials, state and local philanthropies 	<ul style="list-style-type: none"> • Leverage state, federal, and philanthropic dollars to create a virtuous circle in which small investment in the effort encourages ongoing savings and reinvestment.

<p>4. Raise awareness about productivity agenda</p>	<p>Leverage new research to inform the debate about productivity.</p>	<ul style="list-style-type: none"> • Conduct and release a report on the <i>postsecondary education gap</i> that shows the state’s need for higher skills and more degrees and the capacity of postsecondary education to provide them for a larger segment of the population. • Prepare and release a <i>demographic study and regional analysis</i> that identifies whether postsecondary options exist for growth populations where students need them most. • Conduct and release a <i>cost analysis report</i> to illuminate gaps between what higher education costs and what students can afford to pay along with state strategies for cost containment and reinvestment. • Release results of the <i>student flow analysis</i> to identify bottlenecks that keep students from completing higher education with an <i>action plan</i> to remedy these problems. • Use resources such as the Delta Cost Project’s database to perform a preliminary analysis of <i>higher education spending across institutions and sectors</i>. 	<ul style="list-style-type: none"> • Recognition by the public that postsecondary education is important and among higher education that it can be delivered more efficiently and cost-effectively.
	<p>Draw attention to support for the agenda.</p>	<ul style="list-style-type: none"> • Release a <i>state opinion poll and results of focus groups</i> identifying the importance of postsecondary education in the state, whether individuals believe that those who deserve opportunity for higher learning can receive it, the barriers that exist to success, and probing views on strategies and trade-offs required to achieve state and national goals for degree attainment. Just as Public Agenda has done on the national level, the poll could be supplemented by a similar <i>survey of business and higher education leaders</i> to indicate the differences among these key sectors. 	<ul style="list-style-type: none"> • Broader understanding about and acceptance for productivity agenda among state leadership, higher education, and other target audiences.
	<p>Use the media as a vehicle to increase public awareness.</p>	<ul style="list-style-type: none"> • Host a <i>launch announcement</i> to kick off the initiative and build excitement. • Host a <i>media briefing</i> to inform education journalists about the productivity agenda, present potential story angles, and establish initiative leaders as experts to turn to. • Host <i>news events</i> to announce the release of new data and policy reports about how the state can address its workforce needs and keep higher education affordable; • Set up <i>editorial board meetings</i> to educate editors of key media outlets. • Write and place <i>op-ed pieces</i> bylined by leaders with influence to weigh in on key issues of importance. • Create a special <i>Sunday paper insert</i> about the state’s needs for more highly educated 	<ul style="list-style-type: none"> • Increased media coverage about key issues related to degree attainment and cost containment. • Ongoing gubernatorial, legislative, and business leadership for the issue. • Identification of

		<p>workers and the importance of postsecondary education.</p> <ul style="list-style-type: none"> • Host a <i>debate on state public radio or public TV networks</i> about whether more citizens need to go to college and whether college can be made more affordable. 	<p>increasing use of best practices and expansion of model institutions.</p>
	<p>Enlist student organizations to discuss issues on campus.</p>	<ul style="list-style-type: none"> • Reach out to <i>student newspapers</i> and student government to encourage more coverage and commentary of productivity issues on campus. 	<ul style="list-style-type: none"> • Increased dialogue among campus leaders about measures of productivity and efficiency and reinvestment strategy.

Once you've completed this chart, ask some tough questions: Are these in alignment? Are there gaps? Will the strategies and tactics be robust enough to help achieve the communications goals? Which of the strategies and tactics will be most efficient and effective? Do you have the capacity to deliver?

The next section helps identify the resources that you can bring to the effort.

RESOURCES

Use the chart below to indicate the resources that are available to you in-house (as part of your immediate MOA team and its partners) or externally.

Resource	Internal <i>Identify who or what</i>	External <i>Identify who or what</i>
EXAMPLE: Fundraising Support	System development office Governor’s liaison with business community System legislative office (for state funding)	Local fundraising consultant who can help identify and secure funding from foundations in state to match or supplement Lumina grant to support research, college engagement, or other aspect of initiative or provide support after grant expires.
Strategic Communications Consulting and Opinion Research		
Media Relations and Outreach		
Partnerships		
E-outreach (<i>Technology, Web development, online social networking</i>)		
Writing, Publications, Advertising, Graphics, Design		

PRELIMINARY WORK PLAN

In the planning stages of an initiative, you don’t need to have a roadmap that spells out exactly who will do what and when, but you do need to identify who needs to be involved, key roles and responsibilities, and when major activities will take place. The following table is designed to help you think through these issues, giving you a

The following staging chart can be adapted to provide a big picture view of what will happen and when over the course of your campaign.

	Fall '09	Winter '09-'10	Spring/Summer '10	Fall '10	Winter '10-'11	Spring/Summer '11	Fall '11
Launch Phase <ul style="list-style-type: none"> ▪ Creating identity materials ▪ Release initial report ▪ Host launch event 							
Awareness Building Phase <p><i>Leadership Strategy</i></p> <ul style="list-style-type: none"> ▪ Bully pulpit messaging ▪ Sign on champions ▪ Develop legislative materials ▪ Create one-on-one meetings <p><i>Public Service and Ad Campaign</i></p> <ul style="list-style-type: none"> ▪ Radio and TV PSAs ▪ Advertorials 							
Social Marketing Phase <p><i>Youth Involvement Campaign</i></p> <ul style="list-style-type: none"> ▪ Develop youth network ▪ Launch youth campaign ▪ Disseminate products for youth <p><i>Grassroots Involvement</i></p> <ul style="list-style-type: none"> ▪ Disseminate action kits ▪ Conduct trainings for community members ▪ Hold forums with public officials 							
Events <ul style="list-style-type: none"> ▪ Launch event ▪ Awards ceremony ▪ Comeback fair ▪ Youth campaign launch 							
Earned Media							