



Effective Engagement in Regional Initiatives

Steps to Design a Communication Plan to Elevate Client Insights

AT A GLANCE

Effective design of education and workforce pathways requires strong coordination and collaboration between cross-sector groups. Direct service community-based organizations (CBO) have important client insights that can inform the design of regional pathways. This tool showcases the steps that a CBO took to design a communications strategy to elevate client insights and needs with regional partners.

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About JFF

Jobs for the Future (JFF) drives transformation of the U.S. education and workforce systems to achieve equitable economic advancement for all. www.jff.org.

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About the Trellis Foundation

Trellis Foundation is a grant-making, public charitable organization focused on improving postsecondary attainment for low-income students and students of color in Texas. Using a highly collaborative approach that prioritizes catalytic investments, the Foundation focuses on changing or informing policy, practice, and systems. www.trellisfoundation.org

01. Introduction

[Foundation Communities](#), a community-based organization in Austin, TX focusing on affordable housing, financial capability, and college and career preparation, partners with community colleges, workforce development organizations, and regional pathway intermediaries to connect its clients to college, training programs, and employment. Foundation Communities participates in several local pathway initiatives. As a direct service provider, Foundation Communities has deep insight into clients' needs and journeys through pathways. The staff wanted to identify the best way to share these insights with its partners leading various pathway initiatives to inform the design of pathways into high-demand occupations.

Strong communications can:

- Help partners understand an organization's role, assets, and unique contributions in the local and regional ecosystem
- Provide partners with clarity about the impact of an organization's programs
- Build a positive reputation for an organization

Foundation Communities designed a communications plan to guide their approach to sharing insights with higher education, workforce development, and nonprofit partners.

02.

Steps to Design a Communications Plan

The following steps provide a high-level overview of the process any organization can undertake to design a communications plan to share critical information and insights with education and workforce partners. A small team from Foundation Communities gathered for a one-day design retreat to create their plan in a creative and focused environment, however each step could be broken into separate design sessions.

Step 1: Identify and organize partner needs

Create a list of the key audiences your organization wants to establish or deepen a relationship with in your local or regional education and workforce ecosystem. These may be existing partners, leaders of local or regional initiatives, or other stakeholders such as funders or researchers. For each partner, brainstorm:

- What are their biggest priorities? What do they care about?
- What are your organization's current pain points or roadblocks in working with this partner?
- What actions do we hope they will take? How will these actions benefit your clients?
- What information does the audience need to inform pathways design and execution?

Mapping these insights will help your team as you prioritize audiences, design messages, and identify the right fit delivery methods as part of the communications plan.

Activity in action: As Foundation Communities completed this process, they focused on the local community college, workforce development board, chamber of commerce, United Way, and two other nonprofit partners. Across several partners, the team identified that they hope

the partners will take several actions to start or continue to champion Foundation Communities.

This included regularly inviting Foundation Communities into pathways conversations, share about the work of Foundation Communities' education programs with other stakeholders and partners, and provide right-fit client referrals.

Step 2: Identify and assess key organizational assets and client insights

Begin by brainstorming responses to the following prompts:

- What are the key strengths or assets of your organization? Your education or workforce-related programming?
- What words would partners and clients use to describe your organization?
- What differentiates you from similar organizations in the region?
- What makes you unique in this ecosystem?

The key words and unique features of the organization will be used when crafting messaging under step 4. Key words Foundation Communities identified were *established*, *trusted*, *supportive*, and *holistic*.

Next, compile a list of client insights from existing reports, surveys, focus groups, interviews, and talk to client-facing organization staff. Pull out keywords, data points, or themes from across these sources that may be important to elevate to partners.

Step 3: Create a vision and objectives for a communication plan

Setting a clear vision of impact for the communications plan will help the team align on the impact they hope the communications plan will achieve. Write a vision statement by considering the following:

- What will happen as a result of strong communication and engagement with partners?
- How does focusing on communications help our organization?
- What will our relationships in the ecosystem and client outcomes look like as a result of executing this plan?

Create 3-5 objectives for a communications plan that addresses how you will achieve the vision, including reflecting on:

- What is the purpose of communicating key messages?
- What do we want to accomplish with our communications plan?

Identify the potential areas your organization hopes to impact. These may include changes in attitudes, knowledge, behavior, norms, visibility of an issue, partnerships, practices, or available resources. Stating your objectives will keep the communication plan focused and help other internal staff understand why the plan is important to prioritize.

Sample objectives are:

- Strategically elevate client insights to inform pathways design and referral processes (*knowledge and behavior change*)
- Partners regularly and proactively include our organization in key initiatives and cross-sector meetings (*partnership and behavior change*)

Step 4: Prioritize insights, craft messages, and identify dissemination strategies

Referring back to the partner needs mapped during the first step, review each partner's top priorities and the key actions your organization hopes they will take. Using this information, identify 3-5 client insights pulled together during step 2 that each partner should know. For example, if your organization wants to influence changes to an enrollment process for a pathways program, pull out client insights about barriers they are facing to accessing opportunities.

Begin crafting messages that utilize strengths-based language, integrate punchy data points, and tell a compelling story to draw the audience's attention. Different messages may need to be created based on each audience's priorities and key actions you hope they will take based on your key information.

For example, instead of saying, "We work with low-income clients who lack the skills and knowledge to enroll and succeed in a college" reframe by saying, "We serve over 400 clients each year who are motivated and driven to succeed in a high demand career path, but face financial barriers to accessing opportunities."

Brainstorm the tools to create to communicate these key messages and the dissemination methods you will use. Tools may include new written materials like one-pagers, reports, presentations, blogs, social media posts, talking points, or other publications. Dissemination methods may be asynchronous through strategies like newsletters and in-person approaches such as one-on-one meetings with specific partners or leveraging existing initiative meetings to present at. When making these selections, it is essential to understand the most effective methods based on each audience.

Step 5: Create a project plan

Create a project plan that includes concrete action steps, internal staff roles and responsibilities, and timelines. Consider breaking the plan into sections by different workstreams, which may include internal coordination and alignment, designing materials and messages, and partner engagement and feedback.

Additionally, identify internal and external champions that your organization can leverage to review draft materials, help you schedule a meeting with a partner, or serve as an advocate for your organization as you draft and disseminate communications.

Activity in action: One part of Foundation Communities' communication plan included developing new strategies to help partners understand the valuable support they provide to their clients through coaching. The action plan then included steps for gathering input from direct service staff on their coaching approach with clients to synthesize and build into an impact report and talking points.

Step 6: Execute the plan

Begin executing the plan to create new communication tools, gather feedback from existing champions, and launch the tools with the identified partners. Schedule time with your team to assess the effectiveness of your communications plan, determine if the objectives were achieved, and make adjustments as needed to drive towards your overall vision.



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That Works
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