COMMUNICATION PLANNING WORKBOOK

Participant's Manual

Forest Communicators Network

Riga, Latvia 2002

Workshop Presenters

Mike Hogan, Executive Director
Communications Branch
B.C. Ministry of Forests

Mike Hogan joined the British Columbia public service in 1993 with the Ministry of Small Business, Tourism and Culture. In 1994 he became the Director of Communications at Forest Renewal BC, a Crown corporation responsible for investing about $2 billion in enhanced forest silviculture, watershed restoration and promoting the value-added wood-manufacturing sector.

Prior to that, he was the editor of two B.C. community newspapers, served as a regional correspondent for Canada's public broadcasting system, CBC Radio, and was a stringer for the Vancouver Sun. Mr. Hogan continues to write for periodicals.

In December 1999, he became the Executive Director of Communications at the Ministry of Forests in British Columbia. In 1992 the Governor General of Canada awarded Mr. Hogan the commemorative medal for the 125th anniversary of the confederation of Canada "in recognition of significant contribution to compatriots, community and Canada."

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Workshop Presenters

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Bob Burt has a degree in Arts from the University of New Brunswick. He dropped out of law school there and spent the next 20-plus years in journalism, first as a reporter, and then as an editor with several Canadian daily newspapers, including senior positions at The Toronto Sun and The Toronto Star.

In 1990, he joined the federal government as Regional Communications Manager with (then) Forestry Canada and spent the next seven years back in his hometown of Sault Ste. Marie, Ontario. In 1997 Bob took a six-month secondment to Ottawa with the Canadian Forest Service - Natural Resources Canada. He ís still there, and is currently the Manager of Communications and Production.

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Workshop Objective:

To have participants learn skills in strategic communications planning and provide tools to train others.

Why Communicate?

" Communication is essential to human interaction."
- Source Unknown

Other reasons:

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Strategic Communications Planning

Communication supports projects, programs and policies that re q u i re stakeholder acceptance, understanding or action. To do this, communication needs to be planned with a strategic focus that defines a problem or opportunity; relays an expected outcome; defines key stakeholders and develops an effective means to communicate with them that is timely, appropriate and cost-effective.

Within an organization, the impact of both effective and ineffective communication needs to be understood in terms of its impact on policy, and overall objectives of the organization.
The primary purpose of communication planning is to identify a blueprint for action that will help you to meet your project or program goals.

Why Plan?

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When to Plan?

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Grunig's model of Congruency

Congruency Test

Expected Performance
(What stakeholders want you to do)

Perceived Actual
(What stakeholders
see you as doing)

Performance Performance
(What you are doing)
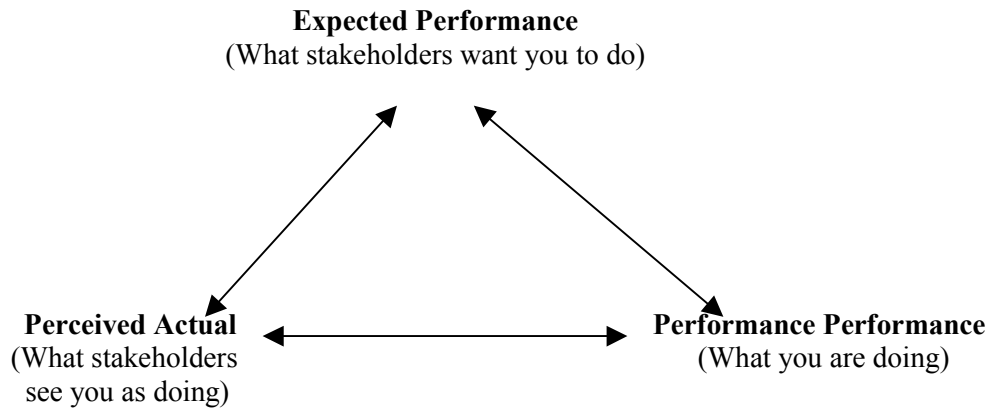
What makes Planning Strategic?

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Types of Communication Plans

Name	Purpose	When to Use

Strategic Communication Plan	Link communications to the organization's strategic or business plan	Same frequency as corporate
Operational Communication Plan	Determine annual priorities, actions & resources	Annually in conjunction with the budget cycle
Project-specific Communication Plan	To support program or project objectives through communications	For new, changed or deleted polices, products, programs, services, and projects
Stakeholder Relations Plan	To define & establish desired relationships with stakeholders	Annually in conjunction with corporate planning
Issue Management Plan	To effectively deal with an issue prior to and during its exposure	When a situation has the potential to be, or already is, publicly controversial
Crisis Communication	To guide & control the swift and accurate dissemination of information	In an unexpected situation that affects, or may affect, health & safety
Special Event Plan	To design and logistically coordinated a large or small gathering of people	Any time an event is being held
Publication Terms Of Reference	To guide production of a publication	Whenever producing a publication
Announcement Opportunities	To identify and analyze news-worthy for announcement opportunity	Whenever an announcement opportunities exists

Project-Specific Communication Planning Model

The following outline will guide you and your project team through the development of a communication plan that supports your project objectives.

Situation Analysis

Subject: Your Project Name

Purpose: Reason you will communicate, generally, to create awareness, understanding, support.

Background:

- A point form list of the salient facts.
- Include any applicable research that's available and pertinent to the project.
- Identify the organization's priorities this project supports.

Organizations Affected:

- A point form list of all organizations that may be impacted.

Audiences:

- List the group of people who have a vested interest in your project, would benefit from knowing of it, or whose support or understanding you require.
- Subdivide large groups (i.e. employees) into smaller subsets wherever possible to target your communication.

Advice and Recommendations

Objectives:

- These are your communication objectives to support your project or program objectives.

• They should describe what it is you want to achieve, or what action you want stakeholders to take.
• Examples are: to inform, to encourage participation, to increase use, to promote, to solicit support, to gain acceptance, to listen, to get input, to educate.

Vulnerabilities & Opportunities:

• Identify issues or vulnerabilities that could hamper the success of your project. Be honest and try to anticipate the things that could inhibit your ability to meet the communication or project objectives.
• Identify the opportunities available that could enhance your ability to meet the project objectives.
• Analyze stakeholder positions on this project, adding any applicable formal or informal research.

Key Messages:

• 3-5 succinct statements that you will use repeatedly in your communication.
• The project's positioning statements; those things you want your stakeholders to know/remember.
• They state the benefits of your project/program by linking it to the organization's priorities.

Strategies:

• A point form list of strategies and actions you will use to support your objectives in communicating with the audiences you've identified.
• You should have strategies that:

- Support each of the objectives.
- Communicate directly with each of the audiences,
- Mitigate vulnerabilities, recognize opportunities.

Implementation

Action Plan:

• A chart of the actions to be taken, who's responsible for ensuring they're done and the targeted completion date for each one.

• Your action plan becomes the tool for monitoring implementation and making changes.

Communication Tools:

• A list of tools/materials that will be used to implement your communication strategies & actions.
• Tools are your tangible outputs. Examples are: letters, e-mail notes, newsletters, news releases, fact
  sheets, presentation materials, brochures, posters, notices, videos, public service announcements.

Resources:

• The resources, both human and financial, required to implement your plan.
• Quantify financial costs, noting where the budget is available and where it is required.
• Estimate the human resource time commitment in terms of hours or days.

Evaluation

• Point form list of measures that will be used to gauge success of the plan and monitor progress.
• Measures of success should be as specific and quantifiable as possible.
• Methods of control should identify actions you will take to monitor progress, such as making it a
  standing item for review at project team meetings.

Individual Responsible:

• The name and department of the person who is responsible for ensuring the plan is implemented.

Key Points

Communication Planning...

- is a blueprint for action
- helps meet program/project objectives
- is the management of communications
- must be implemented and monitored
- should be kept simple
- is part of project management

(Sample Communication Tools/Techniques)

Meetings
- Face-to-face
- Small group
- Large group
- Town Hall
- Teleconferencing
- Video conferencing

Print Materials
- Newsletters
- Direct mail
- Household flyers
- Brochures
- Fact Sheets
- Publications
- Reports

Electronic
• Bulletin Boards
• Web sites
• Email
• Chat rooms
• Videos
• Cable TV programming
• Web casts
• FAQs

Displays
• Static Bulletin Boards
• Malls
• Trade shows, exhibits, conferences
• On-site signage

Public Service Announcements
• Radio
• TV
• Cable stations
• Magazines
• Newspapers
• Vignettes

Telephone Tracking
• Hotline usage
• Inquiries
• Opinions

• Envelope Stuffers
• Annual Reports
• Information Kits
• Calendars
• Posters
• Photography
• Pay stub messages

Formal Research
• Polling
• Focus group testing
• Telephone or mail surveys
• Reader feedback questionnaires
• Mall testing
• Opinion surveys

Correspondence Tracking
• Inquiries
• Opinions

Media Monitoring & Analysis
• Tone
• Placement
• Quantity (linage or airtime)
• Frequency

Letters
• Informational
• Invitational

(Sample Communication Tools/Techniques)

Statistical Benchmarks
• Usage/Sales
• Behaviour change
• Opinion change
• Event attendance
• Hits on a web site
• Publication requests by
quantity and requester

Media/Publicity
• News releases
• Backgrounders/fact sheets
• News conferences
• Interviews
• Letters to the editor
• Op-eds
• Newsletter/magazine articles

Informal Conversations
• Fireside chats
• Dinner table
• Coffee line-up
• Local pub
• Airplane and bus

Expert Opinions/Assessments

Advertisements
• Radio
• TV
• Newspaper (daily, weekly, alternative)
• Magazine
• Bus boards
• Bus shelters
• Billboards
• On facility, building
• Special supplements

Philanthropy
• Sponsorships
• Donations

Conferences/Seminars
• Workshop speaker
• Display/exhibitor
• Program advertising

• Editorial board meetings
• Supplements (feature articles)

Public Speaking/Presentations
Telephone
• Personal phone calls
• Hotlines
• Recorded messages
• Automated phone trees
• 1-800 numbers

Orientation Programs
Research
• Exit surveys/interviews
• Surveys/questionnaires
• Focus Groups

Spokespeople/Testimonials

Partnerships
• Other organizations' newsletters
• Special events, meetings

Managing the Planning

Things currently being done to:

1. Delegate communication planning

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2. Hold people accountable for implementing communications plans

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3. Make planning easy

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4. Make planning real-time

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5. Make plans practical

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Identify three things you are going to do or do differently to manage the planning process within your organization

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Balancing Program and/or Organizational Needs

Problems:

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Opportunities:

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Research on the Cheap

Every public relations program or solution should begin with research. Most don't. Research is essential for communication professionals. Clients and employers care little about what you "think," but they do care about what you "know."

Sound communication programs
must start with research.

- What is research and how would you use it?
- But what about funding?

Research costs money, and communications budgets may be thin, unable to support a five or six-figure research expenditure. According to research authority Walter Lindenmann, long-time re s e a

rch guru at Ketchum, public relations re s e a rch need not be expensive to be effective. Lindenmann offers a half dozen suggestions on how to carry out effective research inexpensively.

1. Secondary Analysis

Secondary analysis is the process of re-examining already existing survey research data from a new and different perspective. It is a research technique that seeks to extract new knowledge from previously conducted opinion studies. Some people refer to secondary analysis as "surveying the surveys."

Two words are key in secondary analysis—systematic and analytic. To be meaningful, secondary analysis needs to be both.

> • *Systematic*: the step-by-step building of data by progressing from one reference source to another and using each as a lead to new, more detailed references.

> • *Analytic*: projects undertaken to analyze specific communication problems and issues.

The research must be designed to provide data that are both quantifiable and projectile.

With the growing wealth of data on the Internet, in source books and periodicals, there are myriad places to which you can go to obtain relevant secondary data. The beauty of secondary analysis is that it's quick and inexpensive since you're eliminating the fieldwork. If nothing else, it avoids reinventing the wheel.

2. Piggyback or Omnibus Studies

Omnibus surveys are all-purpose national consumer polls usually conducted on a regular schedule—once or several times a week—by major market research firms. Organizations are encouraged to buy—or "piggyback"— one or several proprietary questions and have them added to the basic questionnaire. Those who decide to "piggyback" questions of their own are usually charg e d on the number of questions asked.

Omnibus services are usually priced on a per-question basis—that is, you pay only for the specific questions you wish to have asked. Depending on the size and complexity of the research, questions can range from approximately $500 to more than $1,000 per. Many omnibus polls are conducted by telephone, with results available within a period of from three to four days from the start of the fieldwork. Omnibus research services are ideally suited for research for publicity purposes or where an in-depth look is not required.

3. Quick-Tab Polls

The quick-tab poll involves interviews with a small number of respondents—usually between 100 and 250—and involves asking a limited number of simple, closed-ended questions, either via telephone or the Internet. Such polls are ideal to measure consumer reaction in a hurry—often when an organization is the subject of criticism and needs to respond to the problem. Quick-tab polls allow you to respond more intelligently to the attack.

Because the number of questions and sample size are small, the statistical margin of error in such a poll is high. Nonetheless, such research can be an important guide to responding in crisis.

4. Intercept Studies

Intercept studies "intercept" people you happen to come across in a particular setting. You stop them, and ask a number of survey questions. Some people refer to this as a man-in-the-street poll. Intercept studies can be useful for conducting research quickly, efficiently and economically when statistical precision is not crucial.

For example, an organization planning to run an advertising campaign may like a quick, informal general public reaction. Intercept interviews are frequently done near colleges, grocery stores, in indoor shopping centers or malls, in hotel lobbies, and, until recently, at airports.

Trade shows and conferences are also great locations for intercepts, but permission needs to be obtained before any interviewing on premises is attempted.

5. Internet Polls

It's easy, fast and inexpensive to conduct survey research on the Internet. The Net allows you to create and conduct them yourself, without having to install special software.

If you are polling a specific audience and know something about and can control the sample selection p rocess—such surveys are valid. Otherwise, such surveys may not be reliable if polling the general population with few controls.

And, almost all of them—once the completed questionnaire forms have been collected—allow you to review online, the top-line results displayed in colorful charts, graphs and tables. Using these services, you can poll anywhere from several dozen to several thousand individuals in a matter of a day or two.

6. Mail, Fax and Email Surveys
Mail, fax and email surveys, if properly done, can be highly reliable, cost-effective and statistically valid research tools.

These self-administered questionnaire studies are popular but suffer from low response rates, raising questions about the reliability and validity of the data collected.

How do you achieve a good response rate ?

By asking:
- How interesting and relevant are the questions you are asking?
- Is the questionnaire form easy to follow?
- Have you included a postage-paid, self-addressed return envelope?
- Have you offered an incentive as a special reason for responding to your survey?

It's natural for people to want to know, "What's in this for me?" If you answer the question with an incentive, chances are they'll respond to your survey.

Too often, says research expert Lindenmann, public relations professionals spend a small fortune on research and end up with a report that is pretty but not particularly nourishing. What is needed is research that is action-oriented, not necessarily expensive.

Reputation Management

Image

• Aims at strangers
• Is a game of first impressions
• Feels like a fad
• Is transitory
• Seeks to show pizzazz
• Produces good feelings

Reputation

• Aims at stakeholders
• Is based on performance
• Is about reality
• Has stamina
• Is grounded in corporate ethos
• Produces goodwill

The behaviour of the organization needs to be:

• Lawful
• Ethical

- Respectful
- Sustainable

And, its stakeholders and decision-makers perceive it as such.

- Organization's reputation is a product that impacts its social, political and financial worth
- Not a tangible product
- Roots based in credibility and trust
- Earned and needs to be maintained
- Cannot be prefabricated or manufactured

Reputation management needs to be grounded in reality. Some of it can be based on perceptions but the act of sustaining what isn't true cannot be maintained over time.

Assets & Liabilities:

A key asset of reputation management is stakeholder goodwill and loyalty.
Key liabilities begin when:

- An organization provides messages and actions that are inconsistent, or worse, contradictory.
- An organization does not communicate its decisions and the rationale for such with its stakeholders.

For the communicator:

- Examine key areas within your organization to ensure consistency with actions and messages.
- Identify areas that need a reputation "clean up."
- Involve your management team in the reputation building process.

Assessing your reputation :

- Ask employees

• Public surveys
• Ask professionals
• Grassroots outreach
• Stakeholder analysis
• Take a walk and listen
• Listen to and acknowledge criticism
• Non-traditional signals

Reputation Radar

	Low			**High**
We respect the opinion of our employees	1	2	3	4
Our management policies/behaviours are consistent	1	2	3	4
We have a "no surprise" rule	1	2	3	4
We are candid	1	2	3	4
Stakeholders understand our core values	1	2	3	4
We set expectations up front, not after the fact	1	2	3	4
We keep stakeholders and employees informed	1	2	3	4
We tell bad news	1	2	3	4

|				
We care about the community we operate in	**1**	**2**	**3**	**4**
Our communications are easy to understand	**1**	**2**	**3**	**4**
We do what's right over what's expedient	**1**	**2**	**3**	**4**
We care about our clients	**1**	**2**	**3**	**4**
I trust my organization and my management peers	**1**	**2**	**3**	**4**
We consult stakeholders on new policies/programs	**1**	**2**	**3**	**4**

Stakeholder Relations

Grunig's model of organizational communications:

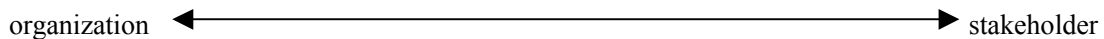Note the direction of information and communication flow:

Press Agency

organization ————————————————▶ stakeholder
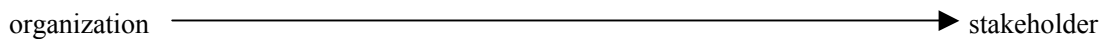
Public Information Model

organization ————————————————▶ stakeholder
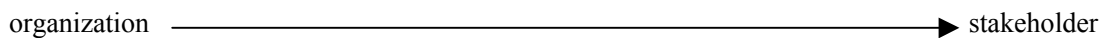
Two-way asymmetrical model

organization ◀————————————————▶ stakeholder

Two-way symmetrical model

organization ←——————————————————————→ stakeholder

Stakeholder Relations—
A Planning Template

Stakeholder: The stakeholder or audience for whom this plan is being done.

Desired Relationship (position statement): A two-to-three-sentence statement that characterizes the optimum relationship or the way the organization would like to be seen by this stakeholder.

Analysis: A synopsis of the current relationship with this stakeholder. Where do we have congruency with the desired relationship, where are the gaps?

Strategy: What strategy will be adopted to maintain the strength of the relationship and address the weaknesses or gaps?

Actions: Are two-fold—those currently being taken to develop and maintain the relationship; and those recommended to enhance it.

Responsibility/Accountability: Who within the organization is responsible and accountable for the relationship with this stakeholder?

Stakeholder Relations

Stakeholder:_____

Desired Relationship:

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Analysis:

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Strategy:

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Actions:

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b) Recommended:

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Relationship Responsibility/Accountability:

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SWOT Analysis

Identify the communications Strengths, Weaknesses, Opportunities & Threats of the organization's strategic priorities & direction.

Strengths:

Look at what has been done well; look at where the organization gained public support through effective communications.

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Weaknesses:

Look back at what you believe could have been improved. Are there perceived weaknesses? What could impact negatively on organization's image, or its products or servicies?

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Opportunities:

Looking forward, do you see any positive or interesting trends? Are there any upcoming strategies that could be exploited? Is there anything that could be taken advantage of to help the organization implement its priorities and direction?

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Threats:

Looking forward, do you see any obstacles? Are there any shifts to the environment that could impact the organization or impede its ability to achieve its priorities?

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Things to do, or to do differently, as a result of the SWOT analysis:

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Media Relations

We all want publicity. And because all of us want the same thing, it's hard to get the ear of people – the reporters - who can tell our story to the public. It's noisy out there. But don't give up. Like most things, beginning with small steps is the way to approach a media campaign. And if you follow a few easy steps, you can still generate some attention.

Consider:

1. What is your overall agenda?

2. How do you want to tell your story?

3. Understand how the media works

4. Find out what makes news

5. What groups of stakeholders do you want to appeal to and how?

6. What impressions do you want your audience to have?

7. What messages are most appealing to your audience?

8. What communications media does your audience use the most?

9. What media is most practical for you to use in terms of access?

Issue Management Framework

Strategic issue management is the responsibility of the entire organization. That responsibility crosses all units, and all reporting lines. It is the external component of strategic management.

This issue management framework involves:

- gathering/monitoring intelligence and information
- analyzing the information and classifying the issue
- taking action and evaluating the results

Defining & Sorting Issues

Issue Definition
Issues are events that occur outside the control of an organization; that affect at some level the strategic direction, core business or mandate of the organization; and that may require the organization to take action. A strategic issue affects the organization's mandates, missions and values, service level, clients, stakeholders and proponents, financing, management or organizational design.*

Issue Sorting
For effective strategic management, issues need to be classified and ranked.

Classification
I.   Classification determines whether the problem is internal or external and routes it accordingly:

• Internal problems — go through inter nal management processes; strategic responses do not automatically require or incorporate the need to interact with external people.

• External issues — are identified by issue management staff and action is determined at the appropriate level of the organization; strategic responses automatically incorporate the need to interact with external people and organizations.

* *Adapted from: Mastering the Public Opinion Challenge by Sherry Devereaux Ferguson,*
(New York, New York: Irwin Professional Publishing, 1994), pp51-79.

Ranking considers variables, including:

- **influence on the organization's survival,**
- **the relationship of the issue to the organization's strategic direction,**
- **stakeholder and opposition stakeholder positions,**
- **key corporate and stakeholder values,**
- **credibility, resources, and power of those bringing the issue public,**
- **public interest in the issue,**
- **media and public agendas,**
- **the credibility of the organization under scrutiny.**

Ranking

I I. Ranking determines the priority order for dealing with and expending resources on an issue.

Establishing Priorities

A: High-priority: relates directly to an organization's mission and mandate; has wide-spread interest; reflects directly on the values of the organization and its partners; can easily attract opposition stakeholders and critics with power; and could influence the organization's potential to function effectively.

ACTION: **One to five hour response time, as circumstances dictate.**

B: Medium-priority: relates to an organization's mandate and mission. It has potential for wide-spread interest; touches on some of the values and concerns of the organization and its partners; and has specific supporters with the ability to rally other groups. It has the potential to move quickly to high

priority; requires immediate detailed monitoring and briefing; and requires an alert to people on 'immediate action' list.

ACTION: Within 48 hours, as circumstances dictate.

C: Non-critical: questions or problems that relate to the organization but are not critical to its survival. It is presented by people without influence and without the involvement of the mass media. However, if these questions become part of a pattern, are co-opted by more powerful organizations or non-supportive stakeholders, they have the potential to become issues.
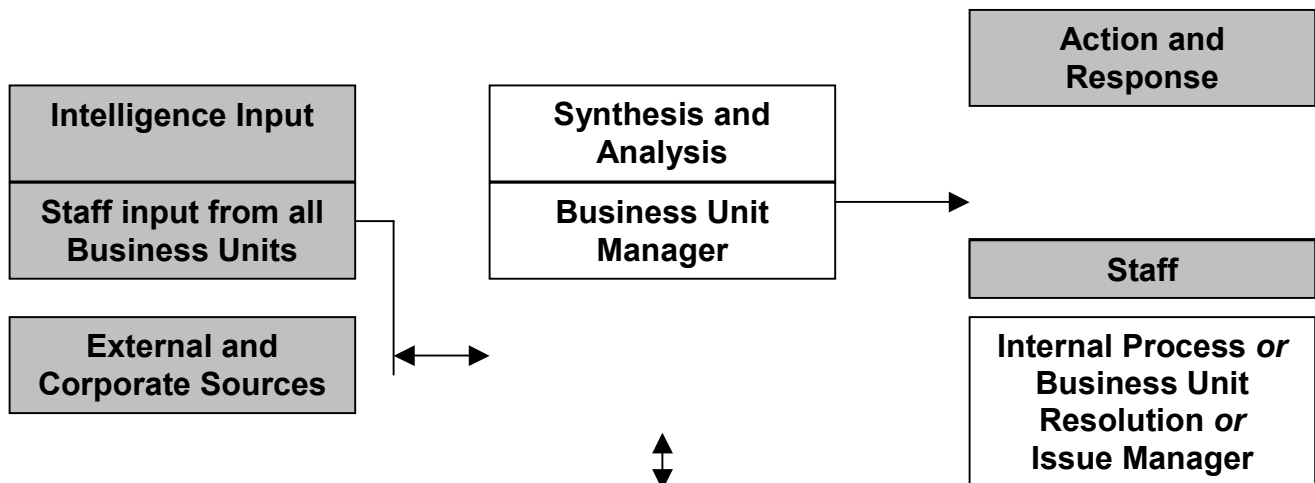
ACTION: Log and monitor for increased frequency, pattern, and interest level.

Crisis

places immediate threat on the organization's mandate and mission and on the organization's ability to function.

ACTION: Implement crisis management plan.

Issue Management Flow Chart

		Action and Response
Intelligence Input	**Synthesis and Analysis**	
Staff input from all Business Units	**Business Unit Manager**	**Staff**
External and Corporate Sources		**Internal Process *or* Business Unit Resolution *or* Issue Manager**

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                   │  Senior Issue   │        │  Internal or External│
                   │ Management Team │ ——————→│        Process       │
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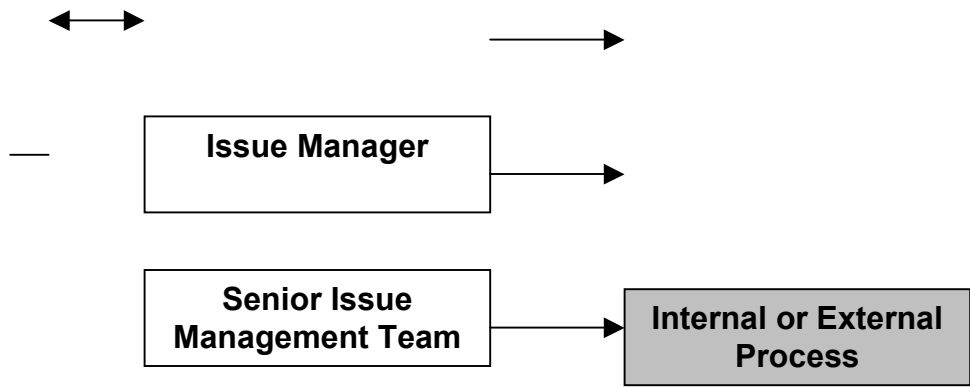
Roles and Responsibilities

Intelligence Input

Function:

Collect and provide intelligence and information about problems and issues that relate to the organization's mandate and strategic priorities.

Responsibility:

All staff supply information through issue management templates. Issue management staff retrieve information from stakeholder contacts, media reports and other appropriate external sources and from corporate projects that generate feedback on corporate activities.

Synthesis and Analysis

Function:
• assess information received from all sources
• classify and rank issue
• recommend action
• provide feedback to staff

Responsibility:
Organization managers; issue management team;*
communications staff

• Classify information based on the organization's priorities.
• Develop a clear picture of the basic information as it relates to the organization's strategic priorities
• Review and evaluate the list of previous issues.
• Classify and rank the issue.
• Recommend action.

Action and Response

Function

• Finalize ranking the issues.
• Take strategic action based on the classification of the issue and its ranking.
• Develop communications strategies, tactics and tools.
• Bring together required members of the organization and partners to deliver a strategic response.

Responsibility

Organization managers; issue manager**

• final priority ranking of issues
• initiating appropriate action

* Issue management team

(as required, comprised of staff able to make decisions on behalf of the o rganization, knowledgeable about an issue and experienced in working with external partners)

• Gather and assess additional intelligence.
• Ensure critical information and detail is available for developing resolutions and action.
• Work with external partners.

** Issue Manager

Role:

The issue manager links line and corporate staff with the issue management process and intelligence obtained from outside the organization. This person is responsible for implementing and maintaining the issue management role and function within the corporation and is responsible also for providing audience-analysis intelligence to the management committee and the crisis communications team.

Specific tasks:

• Gathers intelligence from outside the corporation and provides in summary form to staff
• Facilitates input from key staff and stakeholders
• Ensures liaison with staff and external audiences
• Provides advice to staff about the capture and communication of critical information
• Refines issue intelligence before it is sent to the Issue Management/Communications staff
• Ensures feedback to designated staff
• Co-ordinates development of key communications tools
• Produces an issue assessment monthly for the management committee
• Analyzes issue log and reports to executive
• Works with Information Technology staff to build and maintain information-sharing structure for corporate issue management
• Evaluates effectiveness of issue management based on pre-determined criteria