NAVREF Annual Conference 2019
Hilton Palacio del Rio Hotel, San Antonio, TX
10:30-11:45am, September 17, 2019
Communication Principles and Practices for Dynamic NPCs
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Introduction:
I.   My background as a communication scholar interested in health and medicine
   A.   University of Pittsburgh, COMMRC and Bioethics
   B.   Training manual for lay health advisors at the Center for Healthy Aging
   C.   Theses exploring institutional and individual responses to medical error and breaches of bioethics norms
   D.   New to the VA and NPCs but glad to be able to share communication principles that are relevant for non-profits and anyone engaging with multiple audiences.
II. Preview
   A.   Basic and dynamic models of communication
      1.   Delve into some of the features
      2.   Interact with peers to brainstorm
   B.   Outline the elements of a communication plan: the whys and hows
      1.   Particular attention to strategies and tools to use
      2.   Examples of how we're applying these principles at IMR and other NPCs
      3.   Specific, practical ideas to get started
   C.   Look ahead to more dynamic and synergistic practices of stakeholder *engagement* in research
   D.   Conclude with time for more questions and interactions

Transition: Let's start with the fundamental elements of communication.

I.   Models of communication (Shannon & Weaver)
   A.   Basic
      1. Sender
         a.   Survey audience about their role(s) in NPCs: Directors, Board members, PIs, administrators, communication specialists?
         b.   Who are the people responsible for communication decisions/actions in your org?
      2. Message
      3. Channel
      4. Receiver
   B.   Dynamic

1. Noise
   a. External: technical difficulty, access/reach
   b. Internal: distraction, language barrier, hostility, irrelevance, misunderstandings
2. Feedback/Synchronization
   a. Related to the channel used
   b. Is the sender receptive to feedback?
3. Context/relationship
   a. Hierarchies, roles, decorum
   b. Relational vs. task
   c. Emotional elements
   d. Urgency, priorities, constraints

Transition: Moving on from this abstract model, let's now consider your specific communication opportunities and contexts. Before you can approach an audience with a message, you need to have a clear understanding of your organization's mission and key strengths and communicate that WITHIN the organization as consistently as you do to external audiences.

II. Your Mission and Message
   A. Why is your NPC a unique and valuable organization compared to other research foundations?
      1. SWOT analysis: Strength, Weakness, Opportunities, Threats/Liabilities (Audience participation as individuals, then group discussion)
   B. What message and mission do you want your internal audience to understand, adopt, uphold, and communicate?
   C. What do you want stakeholders to know about your organization?
      1. When people talk about your organization, what do you want them to say? (Solicit audience participation)
      2. **Core message** will address these elements:
         a. **WHO:** What group(s) or communities does your organization serve?
         b. **WHAT:** What does your organization do for those group(s)?
         c. **WHY:** Why do you do what you do?
         d. **WHERE:** Where is your impact focused?
         e. **TO WHAT END:** What's the intended end result of your actions and focus?
         f. Example: IMR's mission is "to support **research and education** at the Durham Veterans Affairs Medical Center for the **enhancement of the health and lives** of the **Veteran population, their families and the public** at large."

Transition: When I was first approached to consult for IMR in Durham, one of the director's concerns was representing the mission of IMR to its diverse stakeholders. This feature of NPCs as a nexus in medical research presents specific challenges and great opportunities for communication. It will help to have an organized, strategic plan for facing these challenges.

According to Guidelines and Principles for Nonprofit Excellence, a communication plan "guides both internal and external communications and **supports the comprehensive organizational**

plan. The communication plan should be directly **related to the strategic plan** and demonstrate **accountability** to constituents and the public. It should be **updated regularly** to ensure it stays current with organizational priorities, technology, and communication trends (such as social media)." Guidelines and Principles for Nonprofit Excellence
https://guidelinesandprinciples.org/wiki/index.php/Communications_Plan

III. Elements of a communications plan (Cause Communications Toolkit)
    A. Goals (general)/objectives (specific)
        1. Must be measurable (Ex: funding goals, PI recruitment)
        2. Tied to the mission and strategic plan
        3. Realistic in scope, budget
    B. Target Audiences/Constituents/Stakeholders/"Receivers"
        1. Which stakeholders do you need to reach with your message(s)?
        2. Stakeholders for NPCs (from broader list at https://www.pcori.org/about-us/our-programs/engagement/public-and-patient-engagement/pcoris-stakeholders) – *Solicit audience response*
            a. Patients: include those who care for them at home, family, patient advocates, unpaid caregivers, those with personal rather than professional experience with illness.
            b. Clinicians: VA and beyond?
            c. Researchers: including funders, other NPCs
            d. Industry: Pharma, devices, technology, electronic medical records companies?
            e. VAMCs and VA health system
            f. Policymakers: government at all levels (advocacy roles, internal VA budget decisions)
            g. Training institutions: universities, continuing ed organizations, medical programs
            h. Is the broader public an audience? As consumers of health care or future beneficiaries of medical advances?
        3. What are the values and concerns of those stakeholders?
            a. What do these stakeholders know/believe/say about you?
            b. Research: surveys, feedback, collaboration, engagement
                (1) Surveys (Cause Communications Toolkit)
                    (a) Phone > written for quality and quantity of responses
                    (b) Quality of the questions matters
                        (i) "Do you agree that this policy is unfair?" vs "In what ways has this policy affected your family?"
                        (ii) "Are you happy with our service?" vs "What are we doing well?" and "In what ways can we improve your experience with ABC?"
            c. Focus groups (Cause Communications Toolkit)
                (1) 6-12 people, online or in person
                (2) Build various groups of like-minded individuals to foster synergy and momentum
                (3) Requires good moderation
                (4) Open ended questions

C. Key messages (recap from above)
   1. Consistent
   2. Memorable and relevant
   3. Simple: Easy to remember for internal and external audiences (no more than three points)
   4. Inspiring (starting with you!)
D. Strategies (approaches)/ tactics (tools)
   1. Segment audiences to frame key messages for each audience
      a. Message should resonate with the values and interests of the target audience(s)
      b. Avoid jargon: level of technical terminology will vary per audience, but be attentive to those who "overhear" the communication
      c. Connotative meanings/value of terms for diverse audiences? Consider testing through focus groups
         (1) Ultimate terms (Richard Weaver): "God" terms, "Devil" terms, "charismatic" terms
         (2) Buzzwords may have different interpretations among stakeholders
      d. Consider these Aristotelian categories
         (1) Ethos: Credentials, character, appeals to authority
         (2) Pathos: Use of emotional appeals and common human experiences
         (3) Logos: Logical, testable, concrete and specific
   2. Include the narratives of real people
      a. Example: stakeholders positively affected by involvement with your organization
         (1) Veteran quotes on VA websites to promote PTSD interventions
         (2) Quotes from researchers on vrfpittsburgh.org
      b. Example: PI profiles on IMR website
   3. Visuals matter
      a. Pictures and videos of real people, rather than cartoons or clip-art – more relatable.
         (1) Representation of diversity in our organization matters: patients, clinicians, researchers, etc
         (2) Plain clothes, uniforms, men/women, ages, races, clinical contexts
      b. Consider contracting with professionals to design a website and logo that are usable, attractive, consistent
   4. Choose the best channels to use to reach and engage each audience (Idealware Workbook)
      a. Annual report
      b. Blogs
      c. Brochure/flyer
      d. Direct Mail
      e. Email
      f. Personal Meetings
      g. Phone Calls
      h. Presentations/trainings
      i. Print Advertising

      j. SMS Text Message

      k. Social Media: Facebook, Twitter, Pinterest

      l. TV advertising

      m. Videos

      n. Website

5. Pay attention to the variety of functions your messages can serve (Idealware workbook)

    a. Creating

      (1) Original content, quotes, stories

      (2) Usually in the form of blog posts, articles

      (3) Example from Institute for Medical Research: Investigator profiles

        (a) Benefit for internal audience: board, director

        (b) Benefit for PI – reframing the value of their work

      (4) Example from Veterans Research Foundation of Pittsburgh: Explanations of the research process from the patient perspective, jargon-free

    b. Community Building

      (1) Engagement – fostering involvement with others

      (2) Asking questions, seeking feedback, thanking people

      (3) Example from pcori.org

    c. Promoting

      (1) Asking constituents for specific action (volunteer, donate, sign a petition, attend an event

      (2) Example from IMR and others: Donation button on page

    d. Curating

      (1) Sharing others' resources, multimedia

      (2) Links to peers' articles

E. Crisis plan

  1. Answer questions fairly and directly; Stonewalling is good cause for distrust.

  2. Actively pursue resolutions and remediations

  3. Look for opportunities to prevent future crises

F. Budget

  1. Cost/benefit analysis of various channels

  2. Investment in your organization's present and future

  3. Consider consultant involvement for specific projects rather than a full-time staff-person

G. Implementation plan with accountabilities, priorities, and timetable

H. Evaluation (what success would look like)

  1. Set benchmarks in advance

  2. Establish clearly defined goals.

  3. Segment your audience.

  4. Test along the way

  5. Be creative in what and how you measure.

  6. Routinely review and readjust your approach.

Transition: Starting with these principles and practices will set you well on your way to maintaining strong, clear, and adaptable communication with your diverse stakeholders. But communication TO and WITH audiences is not the highest fulfillment of these skills and principles.

IV. Evolve into engagement with stakeholders
    A. PCORI.org, PaTH Network, other nationwide research networks adopting dynamic engagement protocols
    B. Contrast traditional "patient subjects" versus engaged "patient partners." Can we work to make patients *equitable* partners in research?
    C. Creatively consider how involving clinicians, researchers, industry, and patients in developing research programs may yield more effective, relevant, actionable research results?
        1. **Interaction** is the rhetorical context for invention and creative growth – doesn't happen just with surveys
        2. Involved at every step of research design
        3. Examples from PCORI.org

Conclusion:

I. We've discussed a LOT of different concepts in a short time – makes this whole process sound complicated
    A. Attention to these details will become more natural with repeated practice and success
    B. Notice examples that you admire—pay attention to what elements make those examples compelling
II. I have curated several free, online resources to guide you in developing a communication plan (see below) – will email them to anyone interested (Pass around a sheet to collect email addresses; post my email)
III. Questions? Observations?

Resources

Cause Communications Toolkit (2005)
    PDF available for free download at: https://ncg.org/resources/communications-toolkit-guide-navigating-communications-nonprofit-world

The Communications Network is dedicated to strengthening the voice of philanthropy; its site contains a variety of communications tools.
    https://www.comnetwork.org

Guidelines and Principles for Nonprofit Excellence
    https://guidelinesandprinciples.org/wiki/index.php/Communication

Idealware.org
    Free downloadable workbook entitled *A Practical Guide to Integrated Communications: A Workbook for Nonprofits* (2013)
    https://www.idealware.org/reports/practical-guide-integrated-communications-workbook-nonprofits/

Patient-Centered Outcomes and Research Institute
    www.pcori.org
    Lists and descriptions of healthcare stakeholders: https://www.pcori.org/about-us/our-programs/engagement/public-and-patient-engagement/pcoris-stakeholders