

Hewlett Foundation Communications Training Participants

Interview Method, Protocol and Scorecard

Among 300 survey participants, approximately 40 of those who also took part in a Hewlett communications training session will be identified to be interviewed and evaluated by a communications professional to determine their communications knowledge, practice and results.

Identifying interview subjects

Using Hewlett-supplied data on session participants and survey data, interview subjects will be identified to reflect diversity in the following respects:

- Training program experienced
- Year of training participation
- Attendance as an individual or a team
- Role within organization
- Hewlett program area supported
- Size of grants received by the Hewlett Foundation

Segmenting and scoring areas of capability

During the conversation, the interviewer will evaluate the interview subject in several areas of capability, including:

- A. Communications integration with organizational strategy
- B. Communications capability
 - Planning and strategy
 - Target audiences
 - Messages
 - Materials (tactics)
 - Measurement
- C. Capacity (talent, money)
- D. Leadership buy-in and support
- E. Program or organizational strength
- F. Mission impact
- G. Value of training experience

Evaluating communications materials

In advance of the interview phone call, interview subjects will be asked to supply key communications materials, including 1) most recent communications plan, 2) communications tools used with greatest frequency and perceived success, which will be assessed and assigned a score in the following ways.

Communications plan

rated as a whole using following scale:

0	1	2	3	4	5	6	7
does not exist	exists in poor quality			exists in average quality			exists in high quality (strategic, targeted, realistic, measurable)

Communications tools

each aspect listed below rated using following scale:

1	2	3	4	5	6	7
poor quality						high quality

- Connected to mission/program strategy
- Clear and concise
- Consistent brand

- Compelling content
- Audience oriented
- Call to action
- Quality implementation
- Measured effectiveness (determined via interview)
- Valued by leadership (determined via interview)

Gathering verbatim comments

Upon interview completion, interviewer will identify one to two verbatim comments made by the interview subject that are most informative to the research. Comments may substantiate any of the seven areas of capability listed above.

Subject identity

Year of training attended (from Hewlett participant data):

- _ 2005
- _ 2006
- _ 2007
- _ 2008
- _ 2009
- _ No Hewlett-sponsored communications training

Type of training attended (from Hewlett participant data):

- _ CLEAR executive training
- _ Hewlett Communications Academy/SPIN executive training
- _ Hewlett Communications Academy/SPIN team training
- _ Tailored training: Hewlett Policymaker Training
- _ Tailored training: Hewlett Community Colleges Communications Retreat
- _ Tailored training: Hewlett Foundation Communications Academy (for Global Development grantees)
- _ Ford Foundation training

Length of training (from survey/Hewlett participant data):

- _ 2 to 3 days
- _ 4 to 5 days
- _ Several days spanning several months

Technical assistance following training:

- _ Yes; purpose _____
- _ No; why not _____

Other training received in past five years (from survey data):

- _ Professional training of 8 hours or more offered by national organization
- _ Professional training of 8 hours or more offered by local/regional organization
- _ Conference sessions totaling 8 hours or more
- _ College courses (two or more credits)
- _ Other: _____
- _ No additional formal training

Role in organization at time of training

(from Hewlett participant data):

- _ Board member
- _ Executive director/president
- _ Communications/marketing/public relations
- _ Program
- _ Financial
- _ Development
- _ Operations

Current role in organization

(ask if different or whether responsibilities have changed):

- _ Board member
- _ Executive director/president
- _ Communications/marketing/public relations
- _ Program
- _ Financial
- _ Development

- Community organizer
- Manager of more than one function
- Consultant

- Operations
- Community organizer
- Manager of more than one function
- Consultant

- No longer with same organization but part of same field (which?): _____
- Neither with same organization or field (which?): _____

Additional training participants representing organization

(from Hewlett participant data, indicate number of each):

- Executive director/president
- Communications/marketing/public relations
- Program
- Financial
- Operations

- Development
- Community organizer
- Board member
- Consultant

COMMUNICATIONS SCORECARD

Questions appearing in gray, are additional probes to be used if time permits and if necessary to gather desired information.

A. Communications integration with organizational strategy

1. What is your communication strategy? (follow-up if needed: How does your organization use communications?)
2. How does your communication strategy relate to your overall organizational strategy?
How does it related to your program activities?
3. Has your communications work ever led you to gain new insights about or to make changes in your organization’s broader strategy, operations or impact?
4. Can you recall any recent program or campaign where communications played a primary role in creating impact or results?

Capability score:

1 (low)	2	3	4	5	6	(high) 7
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Interviewer notes:

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B. Communications capability

Planning and strategy

5. To what extent are your communications activities articulated in a written communications plan or Smart Chart?
6. Can you tie each communications tactic to a mission-related goal?
7. Do you validate communications ideas in any ways before pursuing them fully? (probe for focus groups, constituent interviews, informal audience research, surveys)
8. How, if at all, has your communications strategy been influenced by lessons learned in communications training?

Capability score:

1 (low)	2	3	4	5	6	(high) 7
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Interviewer notes:

(also note perceived influence of training)

Target audiences

- 9. Whom does your organization target with its communications? Why? Who are the decision-makers who have an impact on your mission?
- 10. How do you tailor your communications strategy, tactics and messages to reach target audiences?
- 11. How do you know what moves them to action? (probe for audience research conducted or consulted)
- 12. In what ways do you listen to or interact with members of your target audience(s)?
- 13. How, if at all, has your targeting of audiences been influenced by lessons learned in communications training?

Capability score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:	(also note perceived influence of training)						

Messages

- 14. What's the one thing target audiences should know about your organization?
- 15. What messages of yours do you find audiences respond well to? And, how have you used this insight?
- 16. Do you have a quick, conversational description of your organization, sometimes known as an "elevator speech"? Would you share it right now? (listen for speaker ability and for contents of speech: basic facts, issue or need addressed, solution provided, meaningful words, emotional trigger)
- 17. Do you feel that people across your organization would describe it in the same or a similar way? What percent would do so?
- 18. How, if at all, have your messages been influenced by lessons learned in communications training?

Capability score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:	(also note perceived influence of training)						

Materials

- 19. Tell me about your most effective communications materials.
- 20. Why are they important to your organization or program? Do leaders in your organization value these tools?
- 21. How do you know they work? (probe for measurement of effectiveness)
- 22. How, if at all, have these materials been influenced by lessons learned in communications training?

Capability score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:	(also note perceived influence of training)						

Measurement

- 23. How often are communications objectives or tactics measured? In what ways do you measure success? (probe for outputs vs. outcomes, mission impact)
- 24. Have you ever changed your communications approach as a result of what you learned through measurement? If so, please describe.
- 25. How, if at all, have your methods of measurement been influenced by lessons learned in communications training?

Capability score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:	(also note perceived influence of training)						

C. Capacity

- 26. Who gets involved in shaping your communications strategy? Who implements tactics? What are the experience levels of these people?
- 27. Who are the best communicators in your organization? (probe for whether these individuals are both inside and outside the communications department)
- 28. Do you have the human resources you need to carry out your communications strategy? Are you aware of any significant gaps in skill sets or people power? Follow up to **clarify survey response** about number of people dedicated to communications as full- or part-time job responsibility.
- 29. What do you think are your organization's greatest communications strengths and weaknesses?
- 30. Have you ever contracted a communications consultant or vendor to help with communications? If so, in what situation, and how did it go? If not, why?
- 31. Do you have the financial resources you need to carry out your communications strategy? If not, how inadequate is your budget?
- 32. Since you participated in communications training, has your communications budget increased or decreased (in proportion to total organizational budget)?

Capability score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:							

D. Leadership buy-in and support

(Rephrase questions as appropriate if interview subject is executive leader of her/his organization.)

- 33. What value does leadership place on strategic communications?
- 34. How do leaders within your organization support communications? In what ways do they create obstacles to effective communication?
- 35. Within your organization's leadership, who is comfortable and skilled at communicating the value of your organization to targeted audiences? Please explain.
- 36. What, if any, changes to leadership behavior relative to communications would you attribute to your and others' participation in communications training?

Capability score:

1 (low)	2	3	4	5	6	(high) 7
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Interviewer notes:

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E. Program or organizational strength

- 37. Describe any growth or contraction in your organization over the past five years. (probe for program development, funding, staff, infrastructure, and whether any significant changes happened before and after training)
- 38. Do you attribute any aspect of your organization's health to strategic communications efforts?

Capability score:

1 (low)	2	3	4	5	6	(high) 7
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Interviewer notes:

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F. Mission impact

- 39. What is your mission and how do you measure impact?
- 40. What mission-related accomplishments were most significant to you in the past five years?
- 41. Did communications play a role in reaching these milestones?
- 42. From your perspective, how has communications training affected your organization's overall impact?

Capability score:

1 (low)	2	3	4	5	6	(high) 7
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Interviewer notes:

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G. Value of training experience

43. Let's discuss your communications training experience. Among other things, the training sessions covered:

- Planning and strategy (listen for Smart Chart, measurement)
- Target audiences (listen for public relations, policymaker outreach)
- Messaging (listen for storytelling, elevator speech, public relations)
- And also tactics (listen for collateral/materials development, presentations/meetings, interactive media)

In which area did you learn the most? Please describe.
Which lessons were most relevant to your work? Why?
Which lessons were you able to apply immediately, and which have had enduring value?

44. Did you take advantage of technical assistance or additional coaching following your training? If so, what type? Can you recall one distinct benefit of this technical assistance?

45. Who from your organization participated in the communications training? From your perspective, were these the "right people" based on the type and depth of information covered?

46. Did anyone from your organization who did not attend benefit from the training in any way? Please share examples.

47. Would you recommend the training to anyone else (within or outside your organization)? Who and why?

48. If you were to design a "perfect" communications training for your organization, what elements from this experience would you keep, add or change?

49. Have you participated in any other communications training? If so, can you compare the value and time investment?

Value score:	1 (low)	2	3	4	5	6	(high) 7
Interviewer notes:							

50. Thanks for all you've shared about yourself, your organization and your training experience. Taking everything we've discussed into consideration, would you offer any other comments?

CANDIDATE FOR FULL CASE STUDY?

- _ Yes
- _ No
- _ Maybe

Reasons:

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