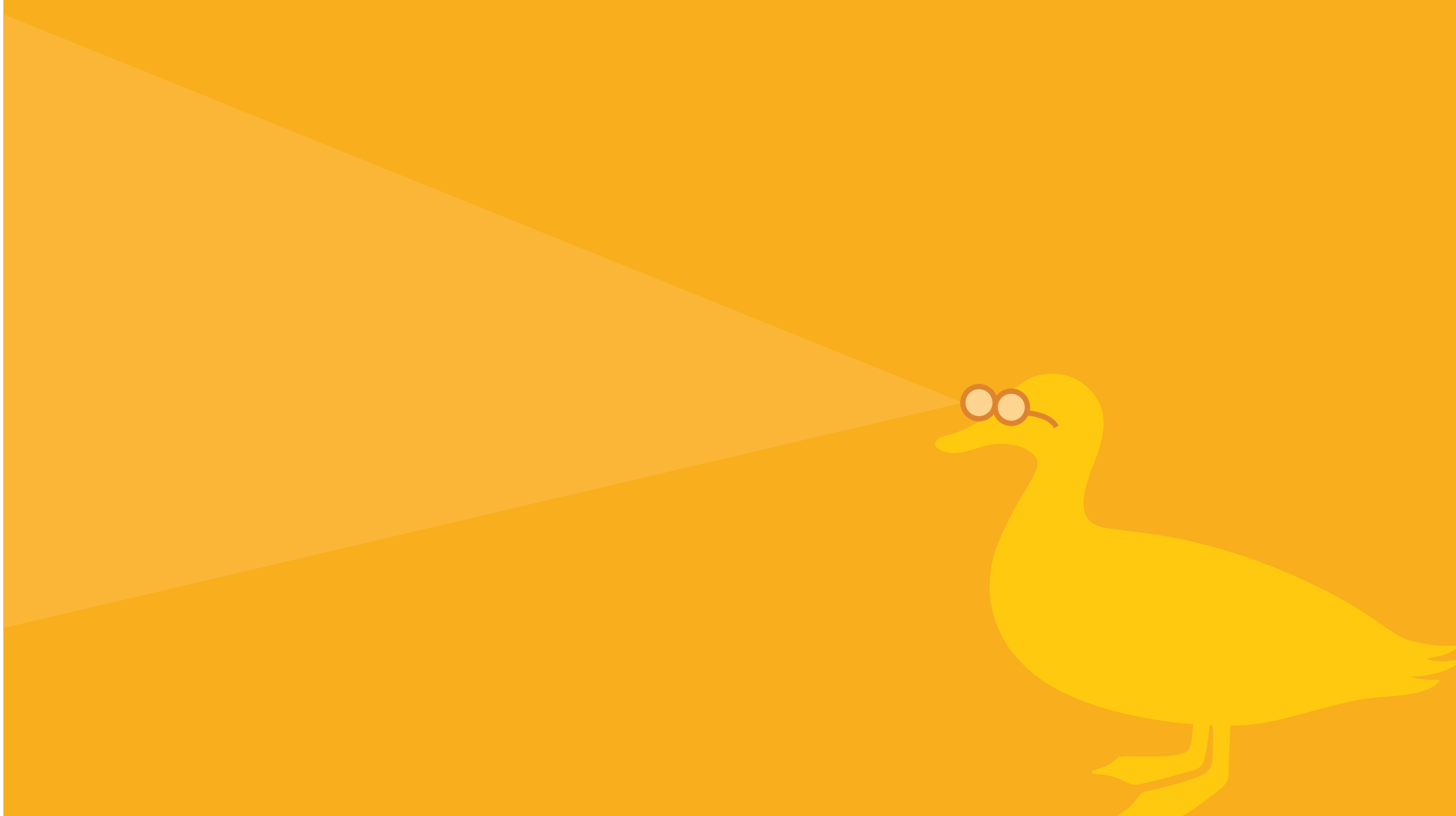
bigduck

RECOMMENDATIONS REPORT

Looking Ahead

Prepared for Critical Ecosystem Partnership Fund | December 18, 2015



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Executive summary

CEPF can use communica-tions to strengthen its position and increase its reach.

The need

As stated at the 24th meeting of the Critical Ecosystem Partnership Fund Donor Council, “after thirteen years of achievement, CEPF is ready to elevate its ambitions and to take on a larger role…” Over CEPF’s history, your communications have helped to cement a strong reputation among donors and grantees. To achieve the ambitions of Phase III, you will need to refine and measure communication practices, increase efficiency, and strengthen branding to help build and support the relationships necessary for CEPF to become a truly transformational fund. With limited available resources for communication, you need a clear roadmap for developing long-term, sustainable growth.

The goal

Use strategic communications to increase CEPF’s reach and better address the biodiversity crisis.

Objectives

Over the next one to three years, CEPF should aim to achieve the following objectives:

- Ensure that CEPF is recognized widely in the conservation community.
- Deepen alignment between CEPF communications and priorities of key audiences.
- Streamline communications practices and optimize based on data and best practices.

Desired outcomes

- Widespread awareness and endorsement of CEPF and its unique role in biodiversity conservation among target audiences
- Unanimous satisfaction with communications among current donors
- Success in supporting recruitment of new donors
- Establishment of new communications/marketing partnerships

About this plan

To help the Critical Ecosystem Partnership Fund move into Phase III, this plan outlines where we recommend you focus your communications and marketing efforts over the next one to two years—using regular analysis to evaluate and adjust your approach.

What do we mean by communications?
Communications is a broad term. In some ways, everyone that works for the Critical Ecosystem Partnership Fund communicates about the Fund on a daily basis, in meetings, email correspondence, and elsewhere.

This plan covers the *official* communications and marketing conducted by CEPF, as well as some that may be handled by your Regional Implementation Teams (RITs). This includes all materials, print or digital, which are shared on behalf of the Fund and events held by CEPF or in its name. It doesn't include communications between individuals in the day-to-day running of the organization (e.g. the grant director's daily management of grantees; responding to data requests made by donors).

How did we develop these recommendations?
The recommendations included in this plan were developed following in-depth research that included:

- Interviews with 18 stakeholders (see Appendix for list of stakeholders consulted)
- Calls with CEPF grant directors and managers
- A review of current CEPF communications materials, messages, and analytics
- An examination of your peers' communication practices
- A communications capacity audit
- Discussions with CEPF Secretariat to review initial draft of this plan

Based on insights produced by this research, we have set goals, objectives, strategies, and tactics that will help to build CEPF's reputation and brand.

How do we define CEPF for communications?
For the purposes of this plan, we consider CEPF to be the Secretariat and the. However, for the plan to be successful you will need to engage the full CEPF community, including donors and grantees. For example, communications that address on-the-ground work and achievements connected to CEPF should reference the "CEPF community," "CEPF's community of donors and grantees," or a similar description.

Finding ways to promote the CEPF community will also go a long way toward achieving many of the strategies and brand elements outlined in this plan, from building relationships to setting a collaborative tone.

Objectives and strategies

CEPF should aim to achieve the below key objectives within three years. These objectives, as well as the strategies that follow each, support the primary goal—use strategic communications to increase CEPF's reach and better address the biodiversity crisis—and were informed by the *Instructions to Consultant* provided to Big Duck, the strategic direction of CEPF's Phase III, as detailed in the 24th Meeting of the Donor Council on January 28, 2014, and the research conducted for this plan.

The level at which you are satisfied with your results will by necessity be somewhat subjective (e.g. how you will define wide recognition) and based on a balance between the need to achieve the objectives and other internal concerns (e.g. how far you want to move toward a perfect alignment with audience priorities).

Objective 1: Ensure that CEPF is recognized widely in the conservation community.
Increasing name recognition as well as clarity around CEPF's niche and impact are key challenges that must be addressed to enable CEPF to have the truly transformational impact on biodiversity sought in Phase III. The following strategies will help CEPF achieve this objective:

- Define and consistently express what makes you essential.
- Involve donors and staff in review of key brand and messaging components to align your core community and produce content that will help to grow the CEPF community.
- Reach out to the larger community of conservation players and potential partners, beyond those CEPF currently works with.
- Make it easy to understand and find information about CEPF's core activities across channels.

Objective 2: Deepen alignment between CEPF communications and priorities of key audiences.
Communications preferences of CEPF's primary audiences (current donors, RITs, grantees, and donor communicators) have been clearly identified through direct interaction with these groups by both CEPF and Big Duck. Responding to these preferences will help CEPF strengthen existing relationships and more easily appeal to potential supporters and partners. The following strategies will help CEPF achieve this objective:

- Solicit feedback from key audiences about how you're doing.
- Make sure program results are clearly defined and regularly reported.
- Regularly cite the alignment of your work with widely recognized goals such as the CBD Aichi Targets and the UN Sustainable Development Goals.
- Focus on the communications channels and activities your audiences value most.

Objective 3: Streamline communication practices and optimize based on data and best practices.
CEPF's communications activities are impressive, spanning a high number of channels and materials with a sustained frequency—though limited resources make big picture thinking and optimization a significant challenge. The following strategies will help CEPF achieve this objective:

- Establish benchmarks using CEPF and industry data and regularly evaluate and refine activities based on data analysis.
- Make communications activities sustainable and scalable, keeping in mind expectations of administrative budget.
- Base scope of communications and expectations for engagement and growth on available resources and audience preferences.

Throughout the following pages of this plan, we offer recommendations for specific projects you can implement to advance these objectives and strategies.

Guiding strategies

Use these strategies to guide all marketing and communica-tions efforts.

The following strategies will be instrumental in helping CEPF achieve the goals and objectives of this communications plan, and should be kept in mind for all communication pieces from tweets to annual reports. These strategies are gathered here, in further detail than elsewhere in the plan, to act as a quick reference for the communications team to measure any activity against.

Express a strong vision.
The decline of global biodiversity is an inherently complex issue that threatens to have a significant impact both on the health of our planet and the lives of humans on it. While a global consensus has emerged on the importance of critical ecosystems, solutions that avoid or significantly mitigate dire consequences have been difficult to ascertain. In this context, CEPF's ability to express a distinct vision for how your approach will reverse negative trends in biodiversity will make your potential clear and provide a powerful tool in your efforts to gain support.

Demonstrate progress.
The relatively small size of CEPF's potential donor pool as well as the amount of funds given by any single donor makes the clear and consistent demonstration of results an especially essential element of CEPF's communication strategy. Communicating impact—toward external measures such as the Aichi Targets and based on internal goals—is equally important for the sectors you serve, as a clear understanding of strategies and their efficacy will be instrumental to the ability of civil society and other partners to effectively support biodiversity.

Give it more heart.
Appealing to the intellect of your audiences with facts and descriptions of well-laid conservation strategies will help CEPF build a reputation as an essential fund. CEPF does a good job of stating *what you do* (promoting biodiversity) and *how you accomplish your goals* (conservation strategies), but too often leaves out a statement of *why your work is needed* (biodiversity is the underpinning of our planet's health). Jumping right into the numbers and details can be a challenge even for primed audiences, and using why statements can both inspire interest and ease a reader or listener in. It is essential to continue appealing to your audiences' hearts, using tactics like storytelling, to maintain interest and build deeper relationships with stakeholders.

Make it easy to digest.
While a portion of grantees will read everything associated with their region, including 50+ page technical ecosystem profiles, the vast majority of your audiences have limited time to read dense materials. For this reason it is essential to provide short, simple, and visual materials and use tactics such as the inverted pyramid to ensure that your messages are absorbed.

Highlight people.
CEPF provides its donors with significant value through its connection to civil society. While keeping an appropriate focus on biodiversity and conservation, it is important to highlight the CEPF community, which is largely comprised of civil society organizations, and the impact CEPF's work has on people and at a high level in your messaging, in your messaging and imagery.

Audiences

Every time you communicate, be sure to pause and ask who it is for, what they need, and what action you want them to take.

Priority breakdown

Primary audience	What they feel stands out about CEPF	What they want from CEPF communications	What CEPF wants them to do
Current donors	Size of the fund, voice given to donors, scale of access to civil society	Results, connection to civil society, accessible content, public awareness	Maintain and deepen support
Current RITs*	Ease of communication, collaborative nature of relationship	Clear information on grant administration	Maintain and deepen relationship
Current grantees	Openness to grantee input, hands on nature, cross-sector connections (for-profit, government)	Access to and lessons learned from global peers, cross-sector connections, translation, less bureaucracy	Support work and deepen relationship
Donor communicators	Size of fund, prominence of donors	Results, high quality visual content, stories	Share CEPF messaging
Potential donors	N/A	N/A	Acquire support

Secondary Audiences

- Potential RITs
- Potential grantees
- Governments where you work
- Other potential partners (private sector and NGOs)
- Members of the public, particularly those interested in conservation and public spending in the donors' countries
- Donors' constituents (people who the donors communicate with on a regular basis)

Ladder of engagement

When thinking about your different audiences, use a ladder of engagement as a framework to make decisions about the content and communications channels to prioritize. The goal for the ladder of engagement is to figure out which communications will move each audience up the ladder, so that they become more involved with CEPF.

* As previously noted, CEPF is considered to be the Secretariat and RITs for the purpose of this plan. However, the RITs are also a primary audience as the Secretariat conducts regular communication with the RITs.

Because CEPF has several different audiences with a variety of needs and desired actions, consider each audience on its own ladder of engagement. Not all of your audiences will begin at the same place, and it will require different channels, materials, and experiences to move them up.

Below is a framework for thinking about your audiences and how to successfully build relationships with them through communications.

	Unaware	**Observers**	**Supporters**	**Ambassadors**
Who is this?	Organizations and governments that care about conserving the world's ecosystems, but have not heard of CEPF	Organizations that know who you are, but have not taken action to become part of CEPF's network	Organizations that have committed to working with CEPF to further it's mission	Organizations and governments that have had a positive experience with CEPF and work actively to recruit others to invest or partner with you
What are they looking for?	A clear understanding of why biodiversity matters, what needs to be done to protect it, and how their goals can be furthered by CEPF	Stories of success and impact that make them feel good about the future of biodiversity and the value of CEPF's approach	Evidence of CEPF's impact and measurable results that reassure them that their relationship with CEPF is important	A sense of community and support; reassurance that that CEPF aligns with and enables the work they do
What do we want them to think?	CEPF enables civil society to conserve biodiversity for the benefit of the environment and people	CEPF stands out from its peers because of the impact its network has on biodiversity	CEPF is an organization to support if we want to empower civil society to conserve the world's most critical ecosystems	Working with CEPF is essential to the goal of preserving biodiversity
What do we want them to do?	Learn about CEPF and start paying attention to its efforts	Participate with CEPF (fund, partner, apply for a grant, etc.)	See CEPF as a leader in biodiversity and commit to long-term partnership	Engage with CEPF regularly and recruit others to do the same
How will we measure this?	Website visits; media impressions; email subscriptions.	Event attendance; email opens and clicks; donations	Alliances facilitated by CEPF network; renew funding	Introductions to potential donors and partners; share CEPF work

Brand strategy

Clarifying your brand strategy can help guide communica-tions with donors and other audiences.

Overview

Your brand is what other people say it is—it is your reputation and how others perceive you. Rather than let that happen accidentally, you can guide this perception by first defining what you want your brand to be and then using every aspect of your communications to amplify this desired association clearly and consistently. At the heart of your brand strategy are three tools: **positioning** (the big idea you hope others will associate with your organization), **personality** (the tone and feelings you hope others would use to describe you), and **archetype** (familiar characters that help people understand who you are and how to connect with you). These tools are used as internal guides that help to shape how your brand is expressed to external audiences.

In addition to the value these elements provide to CEPF's communications team, soliciting feedback from the Working Group and Donor Council will help to increase buy-in of communications activities and alignment of stakeholder goals. Once the below elements of your brand strategy are finalized, you will want to provide training to the CEPF Secretariat and RIT managers.

In developing your brand strategy, we also conducted a review of your peers. We found that CEPF is unique in its highly collaborative approach, sizable yet nimble group of influential donors, broad access to civil society, and comprehensive focus on ecosystems (as opposed to wildlife). There are definite overlaps (e.g., IUCN and broad access to civil society, SOS and donor collaboration), but taken together these traits contribute to CEPF as a distinctive and powerful organization.

Positioning and personality

Positioning

Your positioning statement captures the single idea you hope to own in the minds of your target audiences—the first thing they should think of when they think of you.

Your positioning is typically only used internally. It exists to guide all of your communications efforts and keep them consistent. Any materials you create—written, visual, or spoken—should reinforce your positioning.

CEPF brings people and organizations together to protect the Earth's most biologically diverse yet threatened ecosystems.

Once you approve this positioning, the CEPF Secretariat and RIT members should keep a copy nearby to use as a yardstick. Each time you produce new materials, you'll stop and ask yourself, does this speech, website, brochure, event, etc. reflect and reinforce our positioning?

Personality

Like your positioning statement, your personality is for internal purposes only. Your personality traits are a group of words that describe your tone and style—the overarching feeling you want people to associate with Critical Ecosystem Partnership Fund.

Below is the working draft based on our research, taking both existing materials and stakeholder perspective into consideration:

- **Collaborative.** You provide distinct resources and expertise, but do so through working closely with others. You welcome ideas and feedback from your community and know that you'll be more effective if you can unite diverse solutions in global conservation efforts.
- **Focused.** The job ahead of you is as big, and complex, as they come—and you take it on with appropriate seriousness. When you set your sights on a project, your community knows you will stay the course until it is done right.
- **Powerful.** You have created an influential organization that brings together some of the biggest voices (and deepest pockets) on conservation to partner with international NGOs, civil society organizations, academia and others. Together, you are determined and strong in your approach.
- **Hopeful.** You believe the planet can be saved. You are positive and work to empower others to protect hotspots in their own communities or countries.
- **Protective.** Like organisms in an ecosystem, you recognize that every entity has its own role to play… and yours is that of a trusting partner that sparks action. You pay careful attention to the diminishing resources of the earth and are working hard to reverse the trend.

As with the positioning statement, when you've finalized your personality, revisit it as you create communications materials and messages.

Archetype

We also think that selecting a brand archetype would help guide and connect the tone and style you use across channels. According to brand expert Jon Howard-Spink, "An archetype is a universally familiar character or situation that transcends time, place, culture, gender, and age. It represents an eternal truth."

Archetypes can provide many benefits, including:

- Reinforcing consistent communications
- Being a simple frame that staff and communicators can remember
- Creating differentiation with audiences
- Helping resolve brand inconsistencies

Based on our initial research, we think a helpful archetype for CEPF might be the **Guardian**. Some traits of the **Guardian**, from Archetypes in Branding by Margaret Pott Hartwell and Joshua C. Cohen include:

- "The Guardian finds identity and fulfillment by defending, protecting or caring for others. The Guardian safeguards the collective, is a steward of the family or community and is motivated to directly nurture and protect aspects of humanity and the planet."
- "Seeking to strategically guide and form a path toward the greater good, the Guardian is a bottomless well of compassion."
- "Generally good at communication, both listening and speaking, the Guardian possesses a clear vision of collective empowerment, responsibility and walking the talk."
- "With fierce unconditional love and a commitment to consistent reevaluation of appropriate boundaries, the Guardian is motivated to support, facilitate and protect the self-actualization of the individual."

- Strengths: gift for nurturing guidance, desire to offer loving oversight, protection, and compassionate discipline.

You are already expressing this archetype in some of your materials, with statements like: “Enabling civil society groups to have stronger voices and exert greater influence in the world around them”; “bringing experience and good practice to local contexts, and transferring skills and knowledge to government conservation agencies”; and “ensuring that conservation programs are also beneficial to local people, such as by protecting vital ecosystem services and providing sustainable livelihood options.”

By emphasizing that CEPF is the Guardian, we feel you can balance the somewhat academic, evidence-based details about your work with emotional context about why conservation is so important and inspiring—and present the active role you play by increasing the reach of your donors and empowering regional organizations. Across your different communications channels, we’d love to see you bring out the characteristics of the Guardian more.

Brand identity & messaging

A smart brand identity effectively communicates your positioning, personality, and archetype.

Overview

Armed with a clear decision on brand strategy, you should build out a more robust messaging platform and strengthen your visual identity.

Your messaging platform is your organization's written and spoken brand. It includes elements such as your key messages, written vision and mission statements, and boilerplate and elevator pitch. Clear, compelling ways of talking about your work will help establish CEPF's identity in the minds of your supporters—and help you make an impression on people you're meeting for the first time. What's more, solid messaging can reduce the amount of time you spend developing communication materials by providing you with a framework to guide how you talk about your work.

Similar to brand strategy, soliciting feedback from the Working Group and Donor Council will help to increase buy-in of communications activities and alignment of stakeholder goals. Once the below elements of your brand identity and messaging are finalized, you will want to provide training to the CEPF Secretariat and RITs.

Vision and mission statements

Donors typically look to an organization's vision and mission statements to understand their point of view and gauge their legitimacy before making or renewing a deep investment. With the above brand strategy in mind, we recommend you revise your vision and mission statements.

A **vision statement** describes the "why" that drives what you do. It's your articulation of the better world you're working to help achieve, written in clear, simple language. It paints a picture of the future that inspires people to get involved, and can be a very powerful tool to connect emotionally with donors, grantees, NGOs, partners, and other key audiences. It also takes some of the pressure off the mission statement—allowing your mission statement to stay focused on the "how" and "what" of your work.

You currently don't have a public-facing vision statement, though we did find this mention of organizational vision in your main fact sheet: "maximizing the efficiency and effectiveness of their conservation investment by enabling civil society to protect vital ecosystems and promote economic prosperity." We recommend you write one focusing on a more evocative vision for a future where ecosystems are healthy, biodiverse, and sustainable.

Once it's written, we recommend sharing the statement alongside your mission on your website, as well as in strategic places throughout your online and offline communications.

To back up your vision with a clear path forward and explanation of your role, we recommend updating your **mission statement** as well. This statement should briefly explain your approach for realizing your vision and at the highest level describe what CEPF does. While many organizations and people might share your vision, how you accomplish that vision and what you do should be unique to your organization.

Because mission statements are often what new and existing donors might look at first to understand what you do and whether it's worth getting involved, we recommend that you refine your mission statement so that it's more specific—speaking to what you do in language that your target audiences can easily digest.

Your current statement ("CEPF provides grants to nongovernmental and private sector organizations so they can conserve some of the most biologically diverse yet threatened ecosystems—the world's biodiversity hotspots.") gestures to the right ideas and is brief, but it's quite vague, using terms that might be seen as jargon by some. The long description of CEPF on Facebook offers a more compelling alternative, but doesn't touch on the totality of your work: "CEPF empowers people to be good stewards of the planet, so they and future generations continue to benefit from its life-sustaining resources like clean air, fresh water, a stable climate and healthy soils."

We recommend that you refine your mission statement to briefly explain what you do, using more accessible language that is reflective of your brand and programmatic strategies. Once it's written, feature the statement alongside your vision in a central, visible place on your website, as well as throughout your online and offline communications.

Key messages

Analysis of current key messages
Your current messaging lacks narrative or a cohesive story that ties it together. The five key messages noted in your overview presentation (biodiversity, human well-being, civil society, strategy, and partnership) do a great job of speaking to your approach, but lack a unifying theme or clear rationale for your work. While tools like the key messaging worksheet are a good start, because there are similar points used for speaking with donors and grantees, it becomes less useful and can actually cause confusion internally about what to highlight when. Finally, while we agree that it is necessary to highlight your results, we think it is more important to demonstrate the need for CEPF first.

CEPF was founded almost 15 years ago and it is likely hard for you and your donors to remember what it was like when you didn't exist. But we encourage you to pause and imagine a world without CEPF… What would be lost? Knowing why you are essential can help get to the heart of your story—and your key messages.

As you enter into your third phase of organizational development, use this moment to become "the new CEPF," one whose story is both simpler and stronger.

Message structure
Key messages should tell your organization's story, boiled down to the most indispensable components. They identify the elements that any description of your organization must include, establish a structure for telling your story, and offer sample language that when used consistently will increase your efficiency and ensure that your story is told effectively. Ultimately, you will use the structure of your key messages as a starting point that can frame the communications piece that you're creating.

Your key messages should add up to a compelling case for participation and support—giving you the tools you need to speak affectively to all audiences, from potential donors to existing grantees, and across all contexts, from web pages to event remarks to newsletter stories and more.

Below we provide a recommended structure and suggest messages to form the top—and most essential—level of your key messages. Once your messaging framework and supporting points are in place, you'll use them as the starting point for telling CEPF's story to audiences of all kinds, from donors and partners to grantees and civil society actors. You'll also use this messaging to update your boilerplate ("about CEPF" language) and elevator pitch.

- **Problem.** This message should clearly justify the need for CEPF's existence. It sets the stage for any discussion of your work and will ease even the most committed partner into the story, offering inspiration as it does so.
  The message: The biodiversity of our planet is under threat—which in turn threatens the stability of the ecosystems we all rely on for survival.
  Supporting points: Below this primary messaging level, we recommend developing messages on why this is happening, how this affects people, the rapid rate at which this is happening, and what will happen if nothing is done.

- **Solution.** This message should state what CEPF does to solve the problem, addressing what makes you essential.
  The message: Critical Ecosystems Partnership Fund (CEPF) is the largest fund focused on preserving the world's most biologically rich, yet threatened ecosystems. We mobilize local, regional, and international partners to protect what nature provides for free to their communities.
  Supporting points: Below this primary level, we recommend developing messages about the hotspots (what they are, how many, etc.), the CEPF community (including separate points about your donors and grantees), and your areas of focus (preventing deforestation, etc.).

- **Outcomes.** This message should clearly state your organization's results at the broadest level.
  The message: CEPF works with thousands of civil society organizations to preserve hundreds of species and protect millions of hectares of essential ecosystems that we all rely on for survival.
  Supporting points: Below this primary level, we recommend developing messages on CEPF's impact on species preservation, ecosystem protection, civil society, economies (within the hotspots and more broadly, if possible), and climate change (arguably the most recognized environmental issue today), as well as alignment with external goals (CBD Aichi Targets, UN Sustainable Development Goals).

- **Action.** This message states why we need you to get involved, and actions you can take.
  The message (donors): We can only stop this loss to our world's biodiversity with the full commitment of the international community. We invite you to join us and explore how you can become part of the solution.
  The message (grantees): Reversing biodiversity loss depends on the expertise and focused work of organizations like yours. You know how to address the hotspot in your region and we want to help you do that. We invite you to apply for a grant and join our community.
  Supporting points. Below this primary level, we recommend developing messages on global vs. regional giving, the benefits of becoming a donor, and the benefits of working with CEPF as a grantee.

Boilerplate and elevator pitch

Various stakeholders note difficulty in finding succinct descriptions of CEPF and the work you do. Once you develop key messages, you should use them to create boilerplate language and an elevator pitch that can be made use of in a variety of materials and channels, including your website, reports, and events.

Boilerplate is copy that distills key messages down into short, readable prose, written in the tone and style (personality) of CEPF. You will use it verbatim in any communications piece that calls for an “About CEPF” section. Consistent use of your boilerplate also demonstrates professionalism and helps you establish a clearer sense of who you are in the minds of your target audiences (i.e., reinforces your positioning).

An elevator pitch is one or two sentences that serve as an introduction to your organization, expressed in general, conversational terms that anyone can understand. Ideally, your staff, board and key stakeholders will memorize this description so they can describe CEPF quickly, clearly, and consistently to anyone. Your elevator pitch should serve as a jumping off point to discuss whatever aspect of your work is most relevant to the person you’re talking to, so it will need to be flexible for use across the organization.

Analysis of visual identity

Your visual identity includes all of the visual aspects of your brand—the logo, color palette, typography (fonts), and images your organization uses when communicating with your audiences.

While we do not think a complete rethinking of your visual brand is necessary at this time, as CEPF seeks to further redefine itself as a transformational force in the biodiversity community you will want to periodically check in to ensure that your identity is being properly expressed.

Below are guiding principles and strategies we recommend applying to your visual identity:

Let personality guide your visual brand.
When put together, the personality traits suggested in this plan—collaborative, focused, powerful, hopeful, and protective—create a strong impression. The visual elements of a brand have the power to convey on a deep, even unconscious, level the feelings that help establish or reinforce the central ideas inherent in your personality. However, there is often a wide range of ways that the different traits of a brand’s personality can be interpreted visually. Once you have agreed on final positioning and personality statements, step back and consider how all of your visual elements—from your logo to color palette and font selections—work together to communicate your personality.

Create variations to your primary logo.
Your primary logo has a wide, horizontal orientation. While this generally works well in print publications and some digital tools like presentations, it presents problems when space is limited. Rather than invest in a new identity system, we recommend you create two secondary logos: a vertical version and a badge version that might use the acronym and be used on social media channels. When you create these variations, it will also be important to provide guidelines and examples on when to use each.

Use photography to showcase your dynamic community.

As noted above, a significant portion of what your audiences feel makes CEPF unique and valuable is your ability to bring together and facilitate collaboration among large global funds, international NGOs, and small civil society groups from around the world. The photography CEPF uses of landscapes, people, and animals do an excellent job of showing what you are working for. Use of high-quality, candid photography that shows people working together and local grantees actively working in the field will complement this stock of images and highlight the dynamic, collaborative nature of your work.

Update the Graphic Identity Toolkit.

Your current toolkit provides good guidance on your primary logo and includes details on which colors you should use. As you make the changes noted here, we recommend that you update this toolkit to include the secondary color palette, logo variations, photo guidelines, and typography. You might also consider expanding this document to cover your brand identity and include brand strategy and messaging elements.

Consider a secondary color.

CEPF's primary color is a bright red that projects a forceful and strong vision and maps well to the personality traits of powerful and protective. The sharp angles and thin lines used as design elements communicate a precision that hints at the focused side of your personality. The secondary colors that are used at times provide balance and reinforce aspects of your primary red, such as seriousness (the gray on the website) and a somewhat lighter forcefulness (the orange in the CEPF 101 presentation). A warm, yet less bold, consistent secondary color may help to present a more well-rounded image of your organization's identity and tone that includes softer personality traits including "collaborative" and "hopeful."

Communication activities

Your day-to-day communi-cations are where your audiences actually see, interact with, and build relationships with you.

Overview

Here are the specific strategies and tactics we recommend you implement to optimize how you use each channel to achieve your goals and objectives and reach your priority audiences.

Overarching strategies

- **Do more by doing less.** By scaling back activities on some channels, you will be able to put more energy toward big picture thinking and being more strategic with what you do. This plan does assume you will obtain additional resources (support from more staff or consultants) to accomplish the recommended activities. If you are not able to obtain additional resources, you may need to keep communication frequencies at the low end of the recommendations noted here or even delay certain activities for another year or two.
- **Shift resources to what is most effective.** To make the best use of available resources, it will be important to shift activity away from channels and tactics that reach fewer people and drive less engagement, and toward those that will provide the most exposure and carry the highest perceived value. Data and interviews indicated that email has a high value for CEPF and that social media is not widely consumed, for instance. Further, stakeholder interviews surfaced that shorter content is general favored over longer publications.
- **Be engaging.** Welcome your audiences in by inviting them to take action, using inspirational language, and talking more about the need for CEPF.
- **Commit to relationship building.** Take every opportunity to remind your audiences why they matter. Make CEPF's "community" a key player in your communication and highlight specific donors, grantees, and partners when possible.
- **Make yourself accessible.** Many of your stakeholders don't have the time to read longer materials. Others will have trouble jumping into detailed content on conservation strategies. You can make CEPF more accessible by providing shorter content, using a conversational tone on appropriate channels, and easing readers in using the inverted pyramid and inspirational language.
- **Mind the frequency.** Keep an eye on response rates as well as some industry benchmarks to gauge if there is room for CEPF to communicate more, or if you could scale activity back, on various channels. This will require extra time to collect and analyze data.

Communications activities at-a-glance

As you apply these strategies and confirm if additional resources are available, you will adjust your activities using the recommendations made here as a guide. Here is a top-line snapshot of the channel recommendations found below. Use this as a reference to help you determine the best starting point and adjust activities as you progress.

- **Email:** Two to four email updates a month
- **Website:** Complete a redesign by Q2 2017
- **Blog:** Four to six posts a month (once new blog platform is implemented)
- **Media:** Increase placements in major international media sources
- **Events:**

    - Attend, present at, or exhibit at two to four conferences a year
    - Increase number of community-building events hosted in the hotspots
    - Maximize opportunities for in-person donor meetings

- **Printed materials and publications:**
    - Keep number and length of printed materials low, opting for shorter online content and Powerpoint presentations when possible
    - Publish one annual report, four quarterly reports, a general brochure (if not available), shortened ecosystem profile summaries and fact sheets, and Donor Council meeting documents as necessary. Depending on available resources, production of the above-mentioned shortened materials may need to be spread out over two to three years.
    - Produce three to four infographics in 2016 (including a template to be used for all ecosystem profile summaries), and two to four a year afterwards

- **Video:**
    - Produce one video a year
    - Further define a place for grantee video content

- **Social media:**
    - Post to Facebook three to five times a week
    - Tweet three to four times a day
    - Hold off on diving into LinkedIn, Instagram, Periscope, and other channels until sufficient staff or consultant resources are provided

- **Content banking:**
    - Refresh image bank, including photographs showcasing your dynamic nature
    - Build a regularly maintained story bank

Channels

Email

Both CEPF's email data and stakeholder interviews indicate an appetite for email as a means for receiving news from your organization. For this reason, we recommend a focus on optimizing existing email communication and increasing volume to send two to four emails each month.

Here is what the data says, based on emails sent between May 22, 2013 and July 23, 2015:

Email type	Open rate	Click through rate	Unsubscribe rate
E-newsletter benchmark: Small orgs*	11%	1.0%	0.21%
CEPF all	26%	5.4%	0.13%
CEPF e-news	22%	7.9%	0.11%
CEPF special features	27%	3.4%	0.09%
CEPF events	27%	3.7%	0.003%

Here are some tactics to consider adopting to increase use of email. Depending on resources available, you may find it necessary to pick and chose between the following suggestions.

- **Make the e-newsletter monthly.** Increasing your e-newsletter to be monthly is the first step that should be taken toward responding to this interest. This increase in frequency should be relatively easy to achieve by reducing the amount of content in each e-newsletter, which may also increase click throughs, as there will be less content in the email itself to scan through. We recommend including up to three main stories (including the top story and "Featured Stories"), one to two videos, three "From the Field" pieces, and additional content as necessary. Some content that has been typically included in the e-newsletter may be separated into other regular emails, per suggestions made below.
- **Add regularly provided subscription emails.** You have enough content to report on your work and deepen people's understanding of what you do with separate updates intended for specific audiences. For example, you could remove Grantee Resources from the existing e-newsletter and send it as a separate grantee community update, or as part of a regular grantee e-newsletter. This can help to increase email volume while providing email segments (in this case, grantees) with a more personalized experience, and can be achieved through regular emails such as periodic updates when appropriate content is available, including standalone calls for proposals.
- **Send e-blasts.** Periodic or regular emails that feature single stories or pieces of content that tend to generate high engagement rates can help to increase volume, build on the expectation that CEPF emails demand attention, and bring attention to important stories. Content to consider using for e-blasts include: videos (which tend to produce excellent email engagement), release of lessons learned, placements in prominent media sources, and significant grantee achievements.
- **Work in calls-to-action.** While more traditional nonprofit calls-to-action (donate, advocate, etc.) may not always be appropriate for CEPF emails, asking constituents to take some type of action is a strong recommendation of this plan, as it is a powerful way to increase engagement over email and with your organization in general. One call-to-action that could achieve this and

* From the *M+R Benchmarks 2015* report (see http://mrbenchmarks.com/). For email, reporting small organizations are defined as nonprofits with an email list size under 100,000. Benchmarks for environmental organizations, which CEPF is also comfortably above, are also available here.

contribute to a key communication goal is the tell-a-friend action. By asking constituents to share significant news or information on social media or by forwarding an email, users will engage with CEPF and help to raise awareness and cooperation among key audiences.

- **Integrate communications.** When publications such as Quarterly Reports are provided in print form, follow up with an e-blast to the recipients that links to a digital version of the file.
- **Make email collection institutional.** Your audiences value CEPF emails, but may not always go the distance to find and subscribe to them. Collection of email addresses should become an institutional practice for all teams that have direct contact with key audiences. Key tactics include required email address fields in forms and surveys (digital and print), and a standard dedicated email sent to all new grantees requesting that the primary contact have their staff subscribe.
- **Mind your frequency.** While we recommend increasing email frequency, there is always the danger of sending too many emails. Though your subscribers may very well display a strong interest in CEPF emails, it is always wise to monitor opens and unsubscribes to ensure that your email frequency is not leading to unfavorable rates.

Further notes on email best practices and an analysis of your current e-newsletter are included in the Appendix.

Website

In the survey you conducted this summer, more than 100 grantees, RIT members, donors, and other advisors responded to various communications questions, including, “What should CEPF do to attract more traffic to our website?” You should consider the top five responses to that question when building out the content priorities of the new site, noted below. But also remember that the bulk of responses came from grantees whose primary needs are for tools and support—an important goal, but not the only one for your website.

1. Publish tools to support grantees
2. Publish standard documents and training tools developed by CEPF
3. Publish tools on Conservation Topics, e.g. climate change, invasive species
4. Publish documents and training tools developed by grantees and RITs
5. Publish CEPF's monitoring data with interactive maps

In 2016–2017, we recommend CEPF redesign its website to reflect communications needs and current best practices for how organizations use sites to connect with audiences. We recommend that your new website:

- Is responsive (optimized for all screen sizes, including laptop, desktop, mobile, and tablet);
- Immediately explains CEPF and your purpose in brief, clear language; potentially highlighting the problem you are addressing or need for your work right on the homepage;
- Make better use or primary and secondary navigation to feature the content audiences are looking for vs. a more organization-centric approach and to immediately segment audiences, such as grantees, to the content they need;
- Highlights stories more, moving them from a single section to interspersing them throughout the site so that most pages feature a clear example of your work in action with lessons learned and communities empowered. Each story should also compel website visitors to act, even if that just means digging deeper into the site.
- Brings the hotspots content out more. This information is both key to who you are and what you do, and is also the source of the most traffic on your current site;

- Features big, bold images of the beautiful species and ecosystems you are protecting along with clear statements of impact or action taken;
- Uses video or other animation on the homepage to bring your work to life;
- Highlights a more obvious email sign-up mechanism to better capture the addresses of visitors to all pages;
- Is organized in content buckets that reflect the key messages and/or priorities following a card-sorting exercise (see http://boxesandarrows.com/card-sorting-a-definitive-guide/);
- Provides additional staff and partner contact information so that media is encouraged to reach out for quotes;
- Considers potential donors an audience, making sure to include content that clearly states the benefits of becoming a donor both to the environment and for strategic reasons that will appeal to donors (e.g. access provided to civil society and opportunity to collaborate with Donor Council);
- Highlights new content, paying particular attention to content that your audiences value—including Lessons Learned, clear achievements, and resources;
- Consolidates as much of the content included in Our Stories as possible, as well as The Dodo, into a single blog to produce a more regularly maintained communication channel that is easier to follow, using blog post categories to allow different types of content to be easily found;
- Displays the impact of your work in bold numbers and figures as well as by highlighting species and ecosystems protected (see emphasis put on results on Save Our Species homepage) using quality images;
- Provides select content in the key languages of the hotspots vs. general free translation from Google. While this approach will limit the languages available on your site, it will ensure that the content there is culturally competent and reflective of any particular nuances of that language;
- Is built in an open-source, popular Content Management System, such as Drupal or WordPress;
- Continues to bring in social media content to make the site feel current, but ideally curates content to highlight top stories vs. all of them which can feel overwhelming and diluted; and
- Doesn't use a homepage slide carousel (they are very tempting to use because it allows you to put more content on your homepage, but don't do it—data shows people do not register anything past the first slide or two).

Blogs

CEPF is currently posting roughly once a month to the CEPF blog, and though posts have slowed recently on The Dodo, CEPF has been posting almost every week to that community. CEPF also maintains a Top Articles section of its site, which is updated two to five times a month, and a Voices of CEPF section, which was last updated in January 2014.

To consolidate resources and encourage a more active readership, we recommend posting three to six times a month and following the below recommendations. If resources are limited, you may not be able to implement this set of tactics until 2017 with the new website, through which regular blog posts can help keep the site's content fresh and up-to-date.

- **Bring it all together.** Moving all of the above-mentioned content into a single blog that uses tagging to differentiate between different types of content will provide a more streamlined experience that still allows users to easily find the content they care the most about. Further, using a single blog will allow CEPF to maintain a posting frequency that will keep readers coming back.

- **Host it on the CEPF site.** Keeping the consolidated blog on the CEPF website will help drive traffic to the site, where readers are able to easily click to more information about CEPF, from email and social media. Because engagement on The Dodo appears to be low and the audience seems to be mismatched—primarily animal welfare activists and animal lovers, rather than environmentalists—it will be best to phase this blog out and begin posting all content on the CEPF site.
- **Don't leave anyone in the lurch.** Before leaving The Dodo, publish two to three posts noting the move and linking to the upgraded CEPF blog.
- **Keep it short.** Your audiences have difficulty finding the time to read CEPF materials. Keeping content on the short side will make it more likely that readers will make the decision to follow the CEPF blog on a regular basis. Plus, using tactics to produce shorter content—including summaries of longer pieces like Featured Stories or single-paragraph intros to media placements, partner stories found on social media, or reposts of partner organization blog content—will help to keep your frequency higher. That said, there are members of your audience (particularly grantees) that will look for more in depth content, so including longer posts is not a bad idea as long as they are not the majority.
- **Promote longer content.** Though many of your constituents struggle to find the time to read longer content, they value CEPF's ability to produce more detailed and analytical content and some do want to read it. Your blog can be an excellent place to showcase more detailed content such as Lessons Learned and Featured Stories with short summaries.
- **Be a storyteller.** To engage more readers, blog posts should be written as stories, with a defined beginning, middle, and end. Even when promoting longer content or the work of partners, pull out an interesting story or summarize the key findings and conclusions rather than stating what was done and linking out for more information, which may feel onerous. In the types of shorter posts described above, this can be done with in one or two paragraphs.
- **Add value.** The CEPF blog can be an excellent platform for promoting the work of grantees, highlighting donors and other partners, and bringing attention to interesting media. When linking to external content, make sure you are showing your value as a leader in biodiversity, rather than just as an aggregator. Add something, even if it's one small point, that is not included in the external content.
- **Bring in more guest bloggers.** Attracting contributions from grantees has been a challenge. Consider requesting one post a year from each RIT, setting months you would like the posts by, and having grant directors include quick check-ins in their regular calls. Also consider reaching out to specific, larger grantees such as the Keystone Foundation, making them feel valued by the direct request. Though generating guest blog posts is often difficult, as long as significant resources are not expended chasing content, it can be well worth the effort.
- **Think of it as a resource.** A blog can be an excellent resource for the CEPF communications team. By regularly posting you will have a steady source of content for e-newsletters and social media. And, by using the blog to comment on important news in the conservation world or the work of your donors and grantees, you will be able promote partners and show value (see bullet above) while still driving traffic to the CEPF website.
- **Be prepared.** Before you implement this new strategy, build up a bank of posts to take you through at least the first month. Ideally, you will start with enough content to give you the time to gather subsequent batches of content in advance, rather than having to hurry for new posts when they're needed.

- **Pay attention to frequency of types.** Certain types of content, such as Lessons Learned, may be highly valued by your audience but appear infrequently. Set a schedule for how often different types of posts will appear. Solicit in advance, but still follow your schedule if possible—it's tempting to post content when you have it, but that can lead to longer gaps between posts when you inevitably have difficulty getting a post ready in time for your desired frequency. If a type of post will appear very infrequently, such as once a quarter, you may want to set expectations in a footer that notes when to expect the next one.

Media

Media outreach will help CEPF increase its visibility, which will help provide donors with recognition, attract new supporters, and facilitate new relationships in the hotspots. We recommend pursuing strategies that will lead to an increase in placement in major international publications as a key part of the effort to increase awareness of CEPF and lend extra credibility and recognition among donors.

We suggest considering the below strategies and tactics depending on available resources:

- **Hire the experts.** Working with a global public relations firm will be the best way to take a significant step forward in increasing awareness, a key element of this plan's goal. If this step is not possible, expectations will need to be in line with existing resources.
- **Work with grantees.** If hiring a global public relations firm is not feasible, CEPF should explore options to enable the RITs to seek regional media placements, freeing up resources in the DC office.
- **Focus on international media.** CEPF is doing a good job of placing stories in regional news sources around the world as well as in peer publications. Hiring a media firm to place stories in international media sources—with a readership in the countries where your donor base is—will help increase awareness among potential donors and show value to existing donors.
- **Be selective.** Again, if hiring a global public relations firms is not feasible, CEPF can maximize its efforts by shifting resources away from general press releases toward building relationships at a small set of major publications, though this may still be difficult to achieve if staff resources are not expanded. To build relationships with journalists, create a Twitter list of a select group (less than 10) and try interacting with them on Twitter on a monthly basis, sending them stories that relate to articles they've written, and reviewing specific journalists' past writing in order to reference their work in personalized pitches, as resources allow.
- **Go for the big picture.** While the meat of CEPF stories may often be in specific projects or regions, press releases that focus on broader implications of regional issues can help you appeal to international media sources.
- **Identify the media-ready angle.** What CEPF sees as the key takeaway of a story may not be what grabs the interest of a more general audience. Consider spinning stories in a direction that will catch the attention of larger media sources while still allowing for the content that CEPF most values to be highlighted and disseminated broadly.
- **Make press releases flexible.** When promoting stories about issues (rather than specific projects), make a point to include bulleted lists of regional statistics. This will allow your press release to grab broader attention while also providing an easy angle for regional media.
- **Produce editorials.** Occasional editorials from Olivier Langrad, or regular contributions to sources such as the *Huffington Post* Biodiversity section, will help to establish CEPF as a thought leader in conservation.

- **Quote stakeholders.** Whenever possible, include quotes from stakeholders, primarily donors, in press releases. Quotes from authoritative and external sources make a journalist's job easier, provide an opportunity to highlight supporters, and lend weight to CEPF's work.
- **Explore media partnerships.** Reach out to prominent media sources with an environmental focus—such as *Terre Sauvage*, *National Geographic*, *Smithsonian*, and BBC Earth—to explore potential partnerships in which CEPF provides access to and information from your community and Secretariat to facilitate a placement or series relevant to your work and the publication's niche. Use the names of your donors to lend authority and showcase the potential resources available. This tactic is also one that a media firm can help you with.

Events

As an organization whose priority audiences for communications are specific and relatively small, you'll need to focus on efforts that are high-touch, including events. While we think the bulk of these events should be in-person, there may be room to host more virtual conversations and gatherings.

Events are a great way to emphasize your brand archetype and reflect your personality traits, including collaborative and powerful. You can use events to convene donors and grantees, recognize their contributions and promote their efforts, and inform participants of the collective impact of your work in a specific area or across the world. Some ideas to consider incorporating into your events:

- **Hire or develop the experts.** Event planning is no easy task. Especially for higher-end events, consider hiring event planning professionals or expanding internal resources to allow a single staff person to focus more on building this area of expertize.
- **Recognize donors.** Highlight donors using background slides, table cards, special ribbons on nametags, and your spoken remarks. Ask staff and board members to go out of their way to thank donors when they see them in-person.
- **Showcase your partners.** While presentations and videos at events will show your work in action, use events to capture your work by taking lots of pictures (with permission of course). Use these images in emails, reports, and social media posts. You can also use events to not only share stories, but as a time to gather new ones by interviewing people, ending every conversation with a question about why the world needs CEPF.
- **Actively foster community.** Events are certainly a great way for people to deepen their understanding of CEPF, but they can also be a great way for donors and grantees to get to know each other. Make sure they have time to do so.
- **Follow-up.** Send out a brief summary with event highlights as quickly as you're able. Share key quotes or images so that people who attended—and even those who didn't—are reminded of how valuable your work is. With these brief recaps, include an action for people to take so they can continue to feel they are part of your mission and community. Depending on the content of the event, send the follow-up email update just to attendees or use as an opportunity to engage your entire list.

In order to raise awareness further within the conservation community, CEPF should also pursue opportunities at key third-party conservation events and conferences—where you can show your presence by networking, making presentations, or exhibiting. Key events to consider attending are:

- The IUCN World Conservation Conference (September 2016)
- The Conference of the Parties of the Convention on Biological Diversity (November 2016)

CEPF may also want to explore the following events:

- The Wildlife Habitat Council's Conservation Conference (November 2016)
- The SCB International Congress for Conservation Biology (2017)

Outside of events you produce or present/exhibit at, be sure that all staff who attend partner events on behalf of CEPF always bring business cards and collateral with them, even if just a simple fact sheet or brochure. These representatives should all have your elevator pitch memorized and be ready to talk about CEPF and invite listeners to get involved.

Printed materials and publications

In the interviews conducted as research for this plan, the publications referenced by stakeholders were annual and quarterly reports and the technical ecosystem profiles. Further, donors overwhelmingly focused on two needs in CEPF communications—easily digestible content and clear statements of impact.

In addition, the lack of time for longer materials and the clear choice of email as the preferred communication channel found in stakeholder interviews indicates that there is room for CEPF to shift content from print to digital, and possibly less-formal formats. This will help to conserve resources while allowing for the high-quality production of the remaining printed materials.[*]

To improve absorption of CEPF content, consolidate resources, and reduce costs, we recommend the following strategies and tactics:

- Consistently write using the inverted pyramid (see http://webwisewording.com/inverted-pyramid/)
- Produce infographics
- Shorten ecosystem profile summaries to five pages, including an infographic. Develop an infographic template that can be used for all ecosystems, with appropriate numbers switched in.
- Keep all fact sheets to one to two pages. Shorten two page fact sheets to one page when possible, as resources allow.
- Before producing a publication, explore whether the information can be communicated sufficiently in a less formal manner online. Whenever possible, in lieu of longer printed reports:
    - Conduct presentations to donors, providing Powerpoint decks that include key points, where to find further information online, and contact information to request further detail if necessary
    - Produce less formal blog posts that can be included in reference links provided to stakeholders
    - Highlight information on appropriate web pages
    - Feature online content prominently in an e-newsletter or e-blast, your website homepage, and social media

- Continue to translate shorter materials, including ecosystem profile summaries and infographics, into Spanish and French. Powerpoint decks provided to donors should be translated into Japanese and French.

[*] It is worth noting that the Japanese government places value on high print quality.

- Move to make publications digital-only, including a note in the document and in messages when they are distributed, to highlight the fact that reducing printed materials is in-line with CEPF's environmental mission. It is worth noting that even annual reports are increasingly digital-only in the nonprofit world.
- If not already available, produce a single brochure that provides the basic information on CEPF (the why, who, what, and how) and that touches on key topics that will trigger interest in your audiences (e.g. the Aichi Targets, climate change). If longer printed materials on specific topics are seen as necessary, consider producing a fact sheet instead.
- For documents that may need to change on an annual basis, such as fact sheets, consider having blank templates printed. You can then use print content onto templates in your office, as you would with letterhead.

Video

The videos produced by CEPF are generally well-produced, using professional videographers and editors, and are shared on social media, email, and the CEPF website. Though video could be better integrated into the website, based on current view counts, we recommend producing at most two videos a year and shifting resources to other channels.

We recommend following the below strategies and tactics, while making sure that resources allocated to this channel are kept low:

- **Maintain high quality.** We heard from your audiences that high-quality visual material is valued. When you're mapping out your budget for the following year, make sure to account for the professional services needed to produce high-quality content.
- **Make a place for lower quality video.** In addition to the videos you produce yourself, CEPF posts videos provided by grantees. Because these videos will often be lower quality, establishing one or more categories of video—using standard category titles such as "From the Field"—for grantee-produced content and keeping them separated in clearly identified playlists will allow you to maintain an expectation that CEPF-produced videos will be of a certain quality while conserving resources. To help maintain a certain degree of consistency in these videos, you can include the category titles in the title of the video on YouTube and provide a title slide graphic, guidelines and tips, and even training if resources allow.
- **Keep it short.** Keeping videos on the short side will help to conserve resources and increase viewership, as your audience will see (even before clicking) the amount of time that your videos will require of them. It is a commonly stated best practice to keep online videos, even documentary-style content, no longer than two to three minutes. However, every audience is different—make sure to review your YouTube stats to see how much of your videos your viewers tend to watch before setting a benchmark for CEPF videos.
- **Strategic placement.** Right now, you're posting these videos to social media, but there are other channels to consider.

    - **Website:** The Biodiversity Hotspot web pages consistently receive high numbers of page views, largely due to the fact that grantees check these pages for updates and share them with colleagues. Consider posting videos directly to relevant pages in this section, and developing new videos for any gaps that exist.
    - **Email:** Your e-newsletter outperforms benchmarks for your vertical, and has a high click through rate compared to other CEPF emails. Further, video has been shown to produce strong engagement for nonprofit and corporate email. Consider leading with a video and

  including “Video” in subject lines. CEPF should also consider sending a dedicated e-blast soliciting subscriptions to your YouTube channel, and including a YouTube subscribe link under videos placed on your site.
  - **Blog:** Promoting the release of each new video on your blog can help increase views, build value for your blog, and provide a source of regular content for the blog.
  - **Publications:** Your core publications—annual and quarterly reports, technical ecosystem profiles—are widely consumed, even if not always thoroughly read. Though it is difficult to move readers from a print piece to online content, including a callout with a friendly URL to highlight available videos will inform readers and help prime them to look for video content when consuming your website and emails.

- **Build up b-roll.** As resources allow, consider collecting b-roll footage that will make future production more efficient and give you flexibility when you’re editing.

Social media

CEPF is currently posting at least once a day on Facebook and five to eight times on Twitter. Your main competitors post a bit less frequently, and your audiences prefer to hear from you via email, so CEPF can stand to cut back its social media presence without falling behind. We recommend posting three five times a week on Facebook and tweeting three to four times a day. For further context on social media frequency, here is some good data: http://nonprofitaction.org/2015/02/how-often-should-you-post-to-social-media/

Your current social media use is consistent—you share similar content on every platform and write with the same tone throughout—giving you a streamlined social presence. This puts you in a solid position to begin focusing on improving the efficiency of managing these channels and reducing the resources required to maintain healthy and vibrant communities. To optimize your social media channels, we recommend the following strategies and tactics:

- **Sharing more.** Sharing content directly from donor and grantee social media accounts—retweeting (RTing) on Twitter and using the Share function in Facebook—will show that you are engaged with your network. By adding just a one to two sentence message (e.g. More great work from the CEPF community!) will help to reduce the resources necessary to maintain a vibrant social media presence and increase engagement from your community. We recommend that shared content make up at least 20% of your posts.
- **Showing results.** Your audiences, especially donors, place a high value on measurable impact. Make sure your original content tells a story and shows results.
- **Repurposing content.** Not everything you post needs to be created exclusively for that purpose. Reusing information from channels such as your blog or newsletter will cut back on time and resources spent, while still allowing for original content. This can also send more traffic back to your website.
- **Shortening posts.** A recent study of retail brands on Facebook showed that 40 characters is the ideal length of a post. This may not be possible, or even ideal, for CEPF but it highlights the fact that shorter is better on social media. Start with a 200 character limit and consider applying a template that focuses on the problem, solution, action format. Concisely describe the problem, how it should be solved, and what CEPF and the grantee are doing to achieve that solution, with a focus on any measurable results.
- **Focus on driving engagement.** Social media is all about being social, so always keep in mind whether or not content is designed to generate interactions. The above strategies of

sharing more and shortening posts will help to increase interactions. Other helpful tactics include using a conversational tone, asking questions, posting polls/surveys (Facebook survey app, Survey Monkey Facebook Surveys, Twitter poll feature, etc.), caption contests, etc.

- **Explore LinkedIn.** Because your key audiences are largely organizations, governments, funds and their staff, LinkedIn may be an ideal place for CEPF community building. If resources allow, developing a community (group) on this channel would provide constituents with a feeling of professional development and encourage networking among stakeholders, leading to improved conservation practices. Further, LinkedIn can be added to CEPF's social media activity with relative ease by cross posting the same content between Facebook and LinkedIn via the Company Profile page. But—before you do invest in this channel, we recommend asking donors and grantees about their use of LinkedIn and other channels (see annual surveys recommended in Evaluation).

Key factors

Coordination with CEPF Learning Strategy and Long-Term Vision Development

Your audiences have emphasized the importance of sharing lessons learned and experiences from and among grantees, RITs, and the Secretariat. The Lessons Learned series of articles has been featured for years on the CEPF website and in the e-newsletter, and you have held periodic events to bring grantees together to discuss their work and perspectives. Other lesson-sharing communications products have been developed at the hotspot level and shared via newsletter and website.

This communications plan calls for increasing the spotlight on lessons-related content, as well as top-line results and progress, on the website and via the recommended e-mail and blog strategies, and through other products and activities. These plans dovetail perfectly with the recently drafted Learning Strategy and the Long-Term Visions process that build regional capacity for such sharing, as well as through sharing.

Useful synergies will emerge from these parallel developments of the Learning Strategy and the Long-Term Visions, allowing CEPF to improve communications products in ways that efficiently serve the causes of improving learning and sustainability.

Infographics

Your donors overwhelmingly mentioned needing two things from CEPF communications—short content and clear statements of impact. Infographics are an efficient way to meet both needs. We recommend producing three to four in 2016, including an infographic template to be used across all ecosystem profile summaries, and two to four a year afterwards.

Using professional design services, create infographics that show your success by the numbers in a visual format that is easy to follow and highly shareable. Post these infographics on social media, highly trafficked webpages, and consider including them in e-newsletters and relevant publications.

Donor communicators and Groupspaces

Groupspaces provides a number of potentially useful features, but the low level of activity since the account was created and the lack of awareness found in our interviews may mean it is time to explore other tactics for engaging donor communicators.

We recommend that CEPF organize meetings with working group members and a representative of their communications team to ensure that priorities of the donor council are passed on to donor communicators. This will also lead to the working group members having a greater understanding of communications, help to build support within the donor organizations for collaboration on communications, and provide an opportunity to discuss if Groupspaces is the right tool.

If, after these conversations, a decision is made to pursue Groupspaces further, you will want to develop a communications plan to re-launch the account and maintain regular activity on the account. Otherwise, our recommendations are to:

- Commit to a six-month schedule to regularly provide resources (e.g. social media toolkits) to donor communicators.
- Set up an account on a commonly used platform, such as Dropbox, to share images and other materials.
- Monitor use of resources.
- Schedule informal check-ins with donor communicators and working group members at the end of the six-month period to get feedback.

Content banking

As both stories and quality images are key to attracting and inspiring CEPF's audience, it will be important to keep ahead of the game by developing collections, or banks, of this content.

Building out your image bank may sound fairly straightforward—hire professional photographers to conduct day-long shoots in the hotspots where CEPF works—but it is important to put thought into developing a shot list, and identifying regional colleagues who can accompany and direct, if necessary, your photographers. The shot lists should specify:

- Diversity of scenes (e.g. forests, plains, corral reefs, rivers)
- Diversity of people (e.g. ethnicities, genders, ages, professions, CEPF community member vs. unaffiliated local residents)
- Diversity of activities (e.g. community-based activities vs. CEPF program activities)
- Desired formats (e.g. posed vs. candid)
- Desired feeling and tone (e.g. peaceful vs. active)
- Specific people or programs that may be important for political or marketing reasons to feature

Developing a story bank, rather than reaching out for stories each time they are needed or requested, is a more complex task as the maintenance of a bank requires an instituted practice of story collection. Further, as your stories occur around the world in regions where there is not CEPF staff, an incentives structure that is either monetary (tied to grants) or value-based (tied to value perceived in promotion of stories) is necessary. If resources allow, below are recommended tactics for developing and maintaining a story bank:

- **Build out budgets.** Consider increased budgets for communications in grants for RITs and grantees. A specific budget for equipment such as cameras may be included.
- **Provide training.** Some RIT members and grantees will need to learn how to conduct effective interviews. It can help to show how to apply these skills through a mock interview. In addition to initial training provided to grantees by the communications team, we also suggest providing periodic trainings over the course of the year on individual topics.

- **Require stories.** Start including required questions on grantee questionnaires or forms to provide a bank of rough stories. This will help CEPF staff identify promising stories and reach out either directly or through the RITs for more information.
- **Conduct regular check-ins.** If CEPF goes the route of training story collectors, set expectations at the onset that you will be conducting regular check-ins. We recommend informal bi-monthly check-ins via email or during regular meetings to find out how it is going and make sure you are receiving stories collected. As resources allow, conduct more formal check-ins quarterly, during which you can provide more structured instruction and feedback. Ideally, these check-ins could be incorporated into existing communications, possibly as a brief agenda item on a regular call the story collectors have with grant directors.

Getting it done

To make this plan a reality, you'll need to invest more in people and resources.

Staffing

At CEPF, communications is supported and considered a vital part of your operations. You have a strong team that is incredibly productive, as detailed below; though we worry they may be spread too thin—lacking time for critical analysis.

The communications team currently consists of:

- **Julie Shaw, Director**
  Key responsibilities: Overseeing and implementing communications strategy; acting as chief editor; leading publication and presentation projects; coordinating strategy and content with donor communicators; leading budget and contract processes; managing team
- **Mandy DeVine, Manager**
  Key responsibilities: Writing and editing stories/content for newsletter/website; managing social media; serving as liaison with RITs; leading communications guidance and training with RITs and grantees; coordinating photo licensing and cataloging; overseeing intern program
- **Maren Hozempa, Web Manager**
  Key responsibilities: Leading website design, maintenance, and quality control; coordinating content updates to support key CEPF initiatives and transparency; gathering and analyzing website data and user experience to improve site
-
- The communications team currently handles the following channels and associated tactics:
-
- **Websites**
  - Maintaining and updating cepf.net site daily
  - Writing two articles per month
  - Editing two to three feature stories per month
  - Making bi-monthly updates to French site (CI Japan manages Japanese site)
  - Writing bi-monthly posts for the CEPF Blog
  - Writing two to five posts per month for The Dodo
  - Redesigning key elements as needed (in 2015, included updates to home page, navigation, feature stories, and global investment map)
  - Writing new pages as needed (in 2015, included new Sustainable Development Goals and Climate Change pages)
- **Email**
  - Writing and editing content for bi-monthly e-newsletter
  - Producing, testing, and sending bi-monthly e-newsletter
  - Conducting regular maintenance of online database
- **Social media**
  - Producing one to two Facebook posts a day

- Producing six to eight tweets a day for @CommunityCEPF Twitter account
- Producing one tweet a day for @OLangrad_CEPF Twitter account
- Interacting with followers and CEPF community members daily
- Running channel-specific campaigns (photo contest in 2015)

- **Printed materials** (all items below include writing, editing, and producing)
  - Annual Report
  - Quarterly Reports
  - Executive Director reports for Donor Council meetings
  - Ecosystem profile summaries (one sixteen-page summary produced in 2015)
  - Powerpoint presentations for meetings with Working Group, Donor Council, and potential donors
  - Storytelling packages (two produced in 2015)
  - Collateral (one brochure, holiday card, and banner produced in 2015, as well as business card–sized handouts)
  - Fact sheets (updates made to five fact sheets, in three to four languages, in 2015)

- **Video**
  - Producing two high-quality videos a year
  - Conducting additional projects as needed (helped to edit fifteen videos produced by the RITs in 2015)

- **Media relations**
  - Writing and distributing press releases (two in 2015)
  - Liaising with Conservation International media relation staff for consulting services
  - Maintaining and distributing collection of press clippings and data

- **Additional services**
  - Leading communications strategy development
  - Managing associated contracting process
  - Managing photo licensing and cataloging
  - Providing communications training to RITs and Grantees
  - Event planning (coordinated 2015 engagement at French Embassy, including hotspot exhibit and CEPF display)
  - Managing contract process (strategy, graphic design, writing, translation, video)
  - Coordinating communications efforts with donors and partners (launched Groupspaces site in 2015)
  - Producing of social media “cheat sheets” for donors and partners regularly

Roles and processes

Currently, the three-person team in communications at CEPF (Director, Communications; Manager, Communications; and Web Manager) has strong skills in writing, editing, content development, materials development, and project management—and is producing an impressive amount of work given the team’s size. Though this plan includes suggestions to reallocate resources and become more efficient, to carry out all of the activities noted in this plan it will be necessary to invest in additional support from consultants or new staff to support graphic design needs, data gathering and analysis, media relations, event planning, video production, and day-to-day communications.

As noted in our findings presentation, in addition to providing additional communications resources we recommend you shift your communications practice to:

- Embrace failure and try new things
- Create more time for big-picture, future thinking and partnership development
- Train staff to be messengers and boost internal communications

Here are some suggestions for how you can strengthen your processes to manage communications at CEPF—and to further spread the practice of communication throughout CEPF:

- You have a lot to accomplish, and to do so as efficiently and effectively as possible, it'll be important to be clear on who's responsible for what and when everything needs to be done. If possible, look to minimize overlap in how you spend your time and **assign a clear implementer to each task or project**. Flexibility is important in a fast-paced environment, but different types of tasks (e.g. project management vs. writing) require different mindsets. Because shifting between mindsets can be difficult, assigning types of tasks to specific people as consistently as possible can lead to greater efficiency and quality.

- **Block time for quarterly daylong retreats** for the communications team. Use these meetings to reflect on the past quarter and plan big goals/projects for the next 90 days. Review results and push yourselves to ask how you can continue to improve how you communicate to priority audiences. Assign accountability for each project and/or create a RACI chart, noting who is responsible, accountable, consulted, and informed (see http://project-management.com/understanding-responsibility-assignment-matrix-raci-matrix/). If possible, meet offsite to allow yourselves a space for more creative and uninterrupted thinking.

- Once a year, and then with monthly updates, **create a communications calendar** to coordinate your communications so that your donors, grantees, and others are hearing from you in a consistent, unified way. This includes mapping out communications developed by other teams, which may not go through the communications team currently.

- **Organize monthly meetings to share knowledge** across the organization about what's happening in each department and what's coming up that the communications team needs to know about. This will help inform your content strategy and generate new ideas for stories, blog posts, content for online and print communications, and more. You can also use it as a time to report back on any measurable results from your communications activities.

    - At least twice/year, **examine the activities and results** of the past two quarters and note any trends or implications of activities you should do more or less of. You can also use these six-month check-in meetings to brainstorm new ideas that may be worth trying, based on what you think your audiences are looking for and/or ideas triggered by partners and other nonprofits.

- **Host brand trainings** twice a year to update people on how to use your brand strategy, messaging, and other brand elements. Highlight examples that successfully showcased the desired brand perception, and gently comment on those that may have missed the mark with suggestions on how to improve it for the future. Use these trainings to share any new messaging points and to practice saying the elevator pitch. You can also present any anecdotal feedback you've received to your materials or quantitative numbers on your reach.

- As you move to communicate more frequently, you should consider tasking staff beyond the core communications team with providing updates or rough drafts. To help make sure everyone represents the organization consistently, create or update a set of **guidelines for using social media and teach staff how to write for email and the web**. While the communications team will review and approve all content, if you can get more of your colleagues to create content, your donors will have a fuller sense of your work. Here are some helpful resources on these topics:
  - http://www.classy.org/blog/3-social-media-guidelines-nonprofits/
  - http://idealware.org/reports/nonprofit-social-media-policy-workbook
  - http://blog.hubspot.com/marketing/nonprofit-questions-to-ask-social-media-policy-list
  - http://www.nonprofitmarketingguide.com/resources/email-newsletters/nonprofit-email-newsletters/
  - http://charity.everydayhero.com.au/resources/tips-for-success/top-7-tips-for-nonprofit-email-marketing/
  - http://blog.hubspot.com/marketing/13-nonprofit-marketing-emails-convert-li
  - http://www.usability.gov/how-to-and-tools/methods/writing-for-the-web.html
  - https://www.chapterthree.com/blog/how-write-web
  - http://www.nngroup.com/topic/writing-web/

Budgeting

To successfully follow the full set of recommendations made in this plan, CEPF will need to budget for the following items:

- New staff position (Associate, Communications)
- Brand strategy development (vision and mission statements)
- Brand identity development (key messages and logo variations)
- Brand strategy and messaging trainings
- Website redesign
- Email services (increased volume)
- Media relations
- Print publications (printing, design, and postage)
- Exhibition materials (events)
- Templates and collateral (infographics, event materials, publications)
- Translation
- Video
- Photography
- Event planning

Evaluation

Beyond increasing how often you communicate and sharpening how you do it, you'll need to measure what's working and use that data to optimize your approach.

Evaluation of communications efforts provides us with internal benchmarks against which to measure progress as well as information that can be used to guide and improve future efforts. To conduct effective and efficient evaluation, we recommend you collect data on efforts as they occur and to conduct deeper reviews periodically. To ensure that new data practices are instituted, it is often helpful for the staff responsible to schedule time for data collection and set it as a recurring item on their calendar.

Regular data collection

- Continue collecting and recording media placements as they occur, including clippings, links, and impressions
- One week after emails are sent, pull and record # sent/delivered, open rate, click through rate, unsubscribe rate and data points on any other relevant actions, making sure to note broad email categories (e.g. e-newsletter, events)
- Record # of video views one, three and six months after videos are posted
- Track stories received in a central document, noting key details such as hotspot, ecosystem type, categories of people featured (scientist, civil society organization, the public)
- Record key website traffic stats monthly, including unique visits and page views. Record other data that is more significant when looked at over a period of time quarterly, including top pages, top referrers, and traffic by device
- Track event attendance, noting categories of attendees (e.g. grantees, donors)

Deeper reviews

- At least twice a year, produce analysis of email, website, video, and event data, including percentage change and any insights based on that data. Compare all data to the same period of the previous year.
- Conduct annual grantee surveys that aim to collect a statistically representative sample of data from each hotspot. This survey should focus on use of CEPF materials, satisfaction with materials (in general and with key materials), if key goals of communications are achieved (e.g. how informed grantees feel on lessons learned from other regions or grantees), and goals grantees would like to be addressed.
- Conduct a short surveys once or twice a year with Donor Council and Working Group members. Recommended questions are:
    - Rate your satisfaction with CEPF communication on a scale of one–five.
    - Over the past year/six months, CEPF communications have: Improved, Decreased in quality, Stayed about the same
    - Name one piece of communication that stood out as useful to you.
    - What did you like about it? (optional)
    - Name one piece of communication that stood out as not useful for you.
    - What did you not like about it? (optional)
    - Please enter your name it you are open to further discussion. (optional)

Implementation timeline

Use this timeline to put your plan into action at an energetic, though not overwhelming, speed.

2016 Q1

- Finalize brand strategy elements based on feedback from Donor Council and other key stakeholders
- Begin using brand strategy elements to align communications and guide content development
- Begin transitioning to frequency recommendations for the e-newsletter, social media, and video production
- Develop strategy and schedule for increasing email frequency (to two emails a month in Q1, including e-newsletters, then two to four a month afterwards), including a testing plan
- Build spreadsheets necessary for recommended data collection, and begin regular data collection
- Produce and send grantee survey
- Plan for and coordinate 15th anniversary events at World Conservation Congress in September and CBD Conference of Parties in December
- Conduct first day-long communications team retreat (evaluate and redefine staff roles)
- Solicit buy-in for plan to build out communications resources
- Finalize and approve budget for communications

2016 Q2

- Develop vision statement, updated mission statement, and key messages, and share with Donor Council and other key stakeholders
- Develop schedule for build-out of content banks
- Implement plan to build out communications resources, including hiring of additional staff support, consultants and/or a media firm
- Map out plan for producing infographics and shortened ecosystem profiles and fact sheets
- Produce first infographic and begin work on shortened ecosystem profile summaries and fact sheets
- Start sending two to four emails a month, including the e-newsletter
- Hire designer and/or developer for website redesign
- Agree on goals and needs, determine content priorities, and develop information architecture for new website—taking new brand strategy and messaging into account
- Consult with web developer on platform for upgraded blog
- If, after consulting with web developer, the decision is made to implement an improved blog platform on the current site, determine frequency for blog post types and begin gathering ready-to-publish posts needed to launch the new blog. Otherwise, shift this step to 2016 Q4 to prepare for launching the new blog tactics along with the new website in 2017.
- Share 15th anniversary plans and coordinate engagement with donors and other partners, issue Save the Date invites/outreach for September event, and produce associated communications products
- Conduct second quarterly communications team retreat (check in on how the implementation of additional communications resources is going for the team and with the rest of the Secretariat)

2016 Q3

- Finalize vision, mission, and key messages based on feedback from the Donor Council and other key stakeholders
- Develop and begin providing trainings on brand strategy, brand identity and messaging, and content banking
- Publish updated vision and mission statements and begin incorporating new key messages into all new content
- Produce and send donor survey
- Hold meetings with donor communicators and corresponding working group members
- Set up Dropbox account for sharing content with donor communicators
- Implement plan to support donor communications
- If new blog platform is instituted on existing website, launch new blog strategy
- Design wireframes and page templates for new website
- Produce and publish communications in support for the World Conservation Congress side event and 15th anniversary reception
- Conduct third quarterly communications team retreat (discuss reception and implementation of new brand elements)

2016 Q4

- Conduct any remaining trainings on brand strategy, brand identity and messaging, and content banking
- Implement plans for content banking
- Write content for new website
- Produce light progress report to show initial benefits of built out resources
- Schedule informal check-ins with donor communicators
- Produce and publish communications in support of, and implement 15th anniversary event at CBD COP
- Conduct fourth quarterly communications team retreat (discuss pros and cons of enacted recommendations from Communications Channels and workshop 2017 communications workplan)
- Develop communications workplan for 2017 based on what is working and what is not

2017

- Revisit and update this communications plan based on what you've been able to accomplish, evaluation, and available resources
- Conduct annual brand check-up (see: http://www.bigducknyc.com/conduct-a-brand-check-up), update direction and messaging based on what's working and what's not, and re-train as necessary
- Build out new website, test on browsers, and migrate any necessary content—then launch!
- Launch new blog strategy in tandem with release of new website, if it did not launch in 2016.
- Produce first annual communications report analyzing data from all communications channels, comparing 2016 to available 2015 data
- Consider increasing email frequency if response rates are positive
- One year after internal communications resources are built-out, produce a second progress report to show benefits to donors
- One year after first completed, re-send grantee and donor surveys

- Continue to maintain regular activities recommended in this plan (retreats, data collection/analysis, frequency of content production/publishing, constituent surveys, etc.)
- Assess need for additional/updated infographics and summary documents

2018–2020

- 2018: Review and re-evaluate all regular activities implemented from this plan (retreats, data collection/analysis, frequency of content production/publishing, constituent surveys, etc.) and the original recommendations
- Conduct annual brand check-ups (see: http://www.bigducknyc.com/conduct-a-brand-check-up), update direction and messaging based on what's working and what's not, and update and/or re-train as necessary