

A Mid-Course Audit for Your College- and Career-Ready Communications Strategy

The transition from start-up mode to sustaining mode is simultaneously the best of times and the most challenging of times for communications and outreach in a policy campaign. It is the best of times because you have a team of recognized and active partners, your campaign is a known quantity among key audiences and you have likely notched a couple of policy wins. It is the most challenging of times because it also is a period when your champions and the media move on to other issues (or other jobs), there are changes in leadership and staff among partners and the grind of implementation sets in.

This is a particularly precarious time if your campaign has strong, organized opposition, as skeptics and naysayers are watching for any evidence that your effort does not have staying power and will seize on it if you give it to them. Experience has shown that reform campaigns are more likely to kill themselves through inertia or lack of sustainability planning than be killed by vigorous opposition.

As a result, you need to set aside time and resources a year or two into your campaign to assess where your efforts stand in relation to its communications and outreach goals and identify changes and improvements to be made moving forward. This “campaign check up” should be built around an audit that covers five primary tasks:

1. Assess the [environment](#) (audience awareness/support; campaign assets/obstacles);
2. Evaluate [strategies and tactics](#);
3. Re-test and tune up [messages](#);
4. Refresh and reinforce [supporters](#); and
5. Document and disseminate [progress](#).

While it is important for you to conduct the audit and discuss the results in a way that fits your campaign’s organization and culture, the following are some “rules to live by” in planning and executing your audit:

- *Keep your goals front and center.* Strategy reviews offer many tempting diversions, so it is important to keep participants on task and the conversation moving forward. Reiterating campaign goals throughout the audit is an effective way of doing this.
- *Engage your campaign leadership team and key partners in the process.* People are much more open to feedback and constructive criticism if they feel that something is being done *with* them rather than *to* them.
- *Use data where available.* Self-assessments that are based on intuition or anecdotes rather than data-driven evidence usually aren’t very strategic and won’t necessarily help you make the appropriate decisions and mid-course corrections.
- *Include knowledgeable “outsiders.”* Reach out to individuals and groups who are familiar with your communications strategy but are not involved in its planning or execution. They can provide a more neutral view as well as a reality check for some of your assumptions.
- *Make your audit actionable.* An effective audit looks forward as well as backward. Your auditing process should include concrete next steps, a timeline for completing them and an assignment of responsibility.

The following framework is designed to help you assemble the pieces of your mid-course audit.

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STEP 1: ASSESS THE ENVIRONMENT

Priorities and players on the state policy scene can and do change quickly, so it is likely that the landscape surrounding the college- and career-ready agenda has changed since you launched your campaign. Accordingly, your mid-course communications and outreach audit should start with an assessment of the audiences and issues most likely to affect the future direction and success of your efforts, as well as of your campaign assets and potential obstacles. It is important to do this first, as changes in the level of awareness and/or support among your target audiences will affect your strategies and tactics, messaging, and partners and their roles.

Questions to Ask	Data/Information to Gather
<ul style="list-style-type: none"> ▪ Is college and career readiness a top policy priority in your state? ▪ Who is talking publicly about issues related to college and career readiness? What are they saying? ▪ What issues are dominating statehouse coverage? Can these issues/agendas be linked to the college- and career-ready agenda? 	<ul style="list-style-type: none"> ▪ Scan of recent statements, media clips, legislation, regulations and the state budget for content related to education and workforce issues.
<ul style="list-style-type: none"> ▪ How do key audiences rate in terms of awareness of and support for our agenda? ▪ Are there awareness/support gaps within groups? Between groups? ▪ Has the level of awareness of and support for the agenda improved since the campaign's launch across key audiences? 	<ul style="list-style-type: none"> ▪ Awareness/support index for key audiences (<i>see Appendix A for template</i>).
<ul style="list-style-type: none"> ▪ What are your campaign's current assets? <i>[Common assets include: vocal advocates, new research, legislation in related areas – anything that will aid your efforts to sustain momentum.]</i> ▪ What are your campaign's likely obstacles? <i>[Common obstacles include: organized opposition, lack of support/cover outside the education and policy worlds, legislative agenda dominated by other issues, turnover in leadership and/or leadership staffing – anything that could (or will) slow or divert your campaign.]</i> ▪ How do your campaign's assets stack up in relation to those likely obstacles? ▪ Are there opportunities to leverage particular assets against particular obstacles? 	<ul style="list-style-type: none"> ▪ Inventory and analysis of campaign assets and obstacles (<i>see Appendix B for template</i>).

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STEP 2: EVALUATE STRATEGIES AND TACTICS

Measuring the efficacy of your campaign's approaches and activities is one of the most difficult but essential parts of the audit process. It is difficult because the data you need may not be available and because the people responsible for creating and executing your campaign plan may not see – or be willing to acknowledge – that something is not working or that an investment has not paid off. Yet it is essential because your strategies must adjust to reflect changing conditions; no campaign has enough time, money, people power or political capital to spend on activities that aren't advancing your message.

Questions to Ask	Data/Information to Gather [NOTE: Look for trends/patterns]
<ul style="list-style-type: none"> ▪ How much traction is your campaign having with the media? 	<ul style="list-style-type: none"> ▪ Earned media placements (including impression data if possible).
<ul style="list-style-type: none"> ▪ What returns are you seeing on your paid media investments? <i>[if applicable]</i> 	<ul style="list-style-type: none"> ▪ Audience impressions, click-throughs to campaign Web site, etc.
<ul style="list-style-type: none"> ▪ Is your campaign being recognized as a source of information and expertise on college and career readiness issues? ▪ Is demand for your people, products and services increasing, decreasing or staying the same? 	<ul style="list-style-type: none"> ▪ Web site analytics (number of discrete visitors, average time on site per visit, number of page views and downloads). ▪ Requests for presentations and speeches; presentations and speeches delivered.
<ul style="list-style-type: none"> ▪ How do key individuals and groups feel about the quality and utility of your materials? 	<ul style="list-style-type: none"> ▪ Online survey and/or focus group targeting select individuals from key audiences (may be combined with new message testing).
<ul style="list-style-type: none"> ▪ Are your events well-attended? By whom? 	<ul style="list-style-type: none"> ▪ RSVP and participant lists, event sign-in sheets, event evaluation forms.

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STEP 3: RE-TEST AND TUNE UP MESSAGES

Reviewing and refining core messages midway through a campaign is a balancing act. On one hand, you want to maintain a level of consistency in your messaging, as changing messages too much or too frequently will hamper your clarity and visibility. On the other hand, your messages need to reflect changes in the environment (e.g. changes in fiscal conditions, leadership, research and performance trends). As a result, the mid-course audit of your messaging should proceed on the assumption that your “key three” messages won’t change radically, but that there may be significant adjustments needed on the more audience-specific messages.

Additionally, you may want to gauge the fit between your messages and the vehicles being used to deliver them as part of the review process.

Questions to Ask	Data/Information to Gather
<ul style="list-style-type: none"> ▪ Do your “key three” messages still hold up in terms of urgency and relevance? ▪ Are they widely recognized and understood? ▪ Do they need to be revised to reflect new research or changes in audience dynamics or environmental conditions? 	<ul style="list-style-type: none"> ▪ Survey results of select members of key audiences (who are not directly linked to the campaign) exploring what they think of the power and relevance of your key three messages (using favorable/unfavorable or Likert scale for response rating). ▪ Results from focus group of specific audiences designed to gauge their reactions to the messages, the fit between messages and how they are being delivered.
<ul style="list-style-type: none"> ▪ Do the more targeted/audience-focused messages still resonate with their intended targets? ▪ Do they need to be revised to reflect factors such as changes in awareness/support levels? 	
<ul style="list-style-type: none"> ▪ Are you using the most appropriate and effective vehicles for disseminating your messages? 	

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STEP 4: REFRESH AND REINFORCE SUPPORTERS

Building the support you need to launch your campaign was only the beginning. Growing an active and engaged group of champions and advocates (i.e. policy and thought leaders, broad-based and supportive coalitions) can be even harder. Elections, term limits, promotions (and resignations), retirements, burnout – all of these factors make it difficult to sustain a campaign. Moreover, the champions that helped you get things off the ground may not have the capacity, resources or interest to see the campaign through its next phase. Reform initiatives too often flounder when they encounter opposition and find that reinforcements are sparse because partnerships have atrophied.

As a result, your mid-course review is an appropriate time to assess roles and responsibilities and engage champions in conversations about re-enlisting, adjusting roles and responsibilities, or parting ways and moving on.

Questions to Ask	Data/Information to Gather
<ul style="list-style-type: none"> ▪ How active (and proactive) are your champions/advocates? ▪ If they are more active or engaged than initially expected or promised, why? ▪ If they are not as active or engaged as initially expected or promised, why not? ▪ Are your supporters organized and coordinated? 	<ul style="list-style-type: none"> ▪ Direct/in-kind contributions to policy and communications efforts; coalition support, strength and impact; participation in meetings and campaign events; meetings hosted or presentations delivered on reform issues; development and dissemination of complementary materials by external champions/organizations.
<ul style="list-style-type: none"> ▪ What events (e.g. elections, term limits, retirements, etc.) could affect the composition and strength of our champions/advocates? 	<ul style="list-style-type: none"> ▪ Term of service dates for key champions ▪ Strength of supportive coalitions
<ul style="list-style-type: none"> ▪ Do you have champions that want to scale back or pull out of the campaign? ▪ Are there groups that want to be included or should be engaged? ▪ Are your champions open to adding new supporters to the mix? ▪ Is there a plan for recruiting new champions/advocates? 	<ul style="list-style-type: none"> ▪ “Temperature taking” conversations with champions/advocates that address comfort with campaign direction, role(s), factors that may help or hinder their future participation.
<ul style="list-style-type: none"> ▪ Are champions/advocates filling the roles that best reflect their strengths? If not, how can their role(s) be adjusted? 	
<ul style="list-style-type: none"> ▪ Are you missing key individuals and/ or, groups that could fill gaps or bridge divides between groups? 	<ul style="list-style-type: none"> ▪ Awareness/support index for key audiences (<i>see Appendix A for template</i>).

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STEP 5: DOCUMENT AND DISSEMINATE PROGRESS

One of the most consequential but commonly overlooked elements on any mid-course assessment of a campaign is a public acknowledgement of what has been accomplished – and learned – so far. Doing this accomplishes three things:

- a) It recognizes the efforts of your champions and partners;
- b) It reminds audiences about your campaign and signals where it is headed; and
- c) It sends a message to skeptics and opponents that your effort has staying power.

Questions to Ask	Data/Information to Gather
<ul style="list-style-type: none"> ▪ How much do key audiences know about what has changed (policies, student achievement and attainment, etc.) as a result of your campaign? ▪ Are there success stories and/or lessons from your effort that have not yet been publicly disseminated? 	<ul style="list-style-type: none"> ▪ Readiness-related indicators (high school completion rates, exit exam results, college remediation rates). ▪ External research/evaluation of programs or select sites where new policies are being implemented. ▪ Interviews with business leaders and educators focusing on what they're seeing and learning as a result of the college- and career-ready reform and communications efforts.

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APPENDIX A: AUDIENCE AWARENESS/SUPPORT INDEX

A strategic communications plan should always include an assessment of key audiences for your policy agenda; specifically, identifying those audiences and gauging their awareness of and support for your efforts. It is important to conduct an audience map at the beginning of your campaign and to revisit it periodically so that you can measure the effectiveness of your communications and engagement strategies – and re-adjust your strategies accordingly.

For the following table, please rank each audience’s level of awareness of and support for the goals/intents/content of the college- and career-ready agenda in your state on a scale of 1-5, with 1 indicating “not at all aware/supportive” and 5 indicating “very aware/supportive.”

AUDIENCE	AWARENESS	SUPPORT
Policymakers		
The Governor		
State Board of Education		
State Legislature (overall)		
Legislative Leadership, including key education and appropriations committee chairs		
K-12 Audiences		
K-12 Superintendent/State Chief		
District Superintendents		
High School Principals		
Teachers		
Guidance/Career Counselors		
Higher Education Audiences		
Higher Education Chief		
College Presidents		
Faculty (2- and 4-year institutions)		
Community Audiences		
Parents		
Students		
Civil Rights Organizations		
Philanthropic Organizations		
Business Audiences		
Business Leaders/Executives		
Business Coalitions		
Labor/Workforce Organizations		
Media		
Mainstream Media (print, radio, broadcast)		
New Media (blogs, etc.)		
OTHER:		
OTHER:		

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APPENDIX B: INVENTORY/ANALYSIS OF OPPORTUNITIES AND CHALLENGES

There is great value in taking an inventory of the opportunities and challenges, at the mid-point of your college- and career-ready campaign efforts, to re-evaluate where you should target your efforts, energies and resources.

The following list provides examples of the kinds of opportunities that are emerging in some states. This list is by no means exhaustive and you should think about other potential opportunities that exist in your state. Once you identify what may be happening in your own state that might help advance the college- and career-ready agenda, please rate those opportunities on a scale of 1 to 5, with 1 indicating “no opportunity” and 5 indicating “a strong opportunity.”

	1 – No Opportunity	2	3	4	5 – Strong Opportunity
Due to the current economic crisis, and opportunities provided through the stimulus package and Race to the Top, policy leaders are increasingly ready to try new policy approaches.					
New research is in the pipeline that will draw attention to issues surrounding college and career readiness.					
New policy work (such as proposed legislative bills) is in the pipeline that will draw attention to issues surrounding readiness.					
The governor is willing to speak out about the need for improved college and career readiness.					
Business leaders are supportive or are becoming more outspoken about readiness issues.					
There are signs of growing pressure (from the public, advocacy groups, outspoken political leaders and others) for the state to take action on the readiness agenda.					
The media has been or is beginning to pay more attention to how well students are prepared for college and the workforce.					
New resources are available to galvanize support, plan and take action on the readiness agenda.					
There are signs that K-12 and higher education leaders have or are willing to take on the readiness agenda as a top priority.					
Key organizations (community-based organizations, business groups, campus groups) have made improving readiness a high priority.					

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The following list provides examples of the kinds of challenges some states may face. This list is by no means exhaustive and you should think about other potential challenges that exist in your state. Once you identify what may be happening in your state that might block the advancement of the college- and career-ready agenda, please rate these challenges on a scale of 1 to 5, with 1 indicating a “serious challenge” and 5 indicating “not a challenge.”

	1 – Serious Challenge	2	3	4	5 – Not a Challenge
There is limited awareness of the components of the college- and career-ready agenda.					
There is a lack of awareness of what “college- and career-ready” means.					
The agenda is too closely associated with a single or handful of key leaders making sustainability a challenge in the event of turnover					
The current economic crisis creates a need for immediate fixes rather than more long-term solutions.					
Policymakers already believe they have made significant improvements.					
Legislative leaders may oppose these efforts.					
There is a lack of engagement by the governor.					
Entrenched policies/practices may work against advancing innovative strategies.					
Readiness is disconnected or not relevant to current issues on the state’s agenda.					
Leaders agree about readiness in principle, but not in policy/practice.					
There is a lack of business leadership to provide political cover and support.					
There is a lack of higher education leadership to provide political cover and support.					
There is a lack of public support.					
There is strong, well-organized opposition.					