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Organizational need #1: Defending the castle

It's critical to counteract and curtail the effort led by a group of State Senators who are:

- Attacking the formula for equitable charter public schools (CS) funding
- Attempting to rally public support and influence their peers to join them in placing crippling and long term limits on CS funding

In short: The very existence of CSs in Illinois is at stake.

Strategic objective

To meet this challenge, I propose INCS adopt the following strategic advocacy plan to:

- **Communicate** the potentially existential issue we face to stakeholders, and how they can help
- **Design** and implement a special earned media communications plan to augment and potentially supplant parts of our existing annual communications plan
- **Adjust** the paid media budget appropriately for the remainder of FY 2020
- **Construct** the FY 2021 budget and communications plan with this challenge in mind

Target audiences

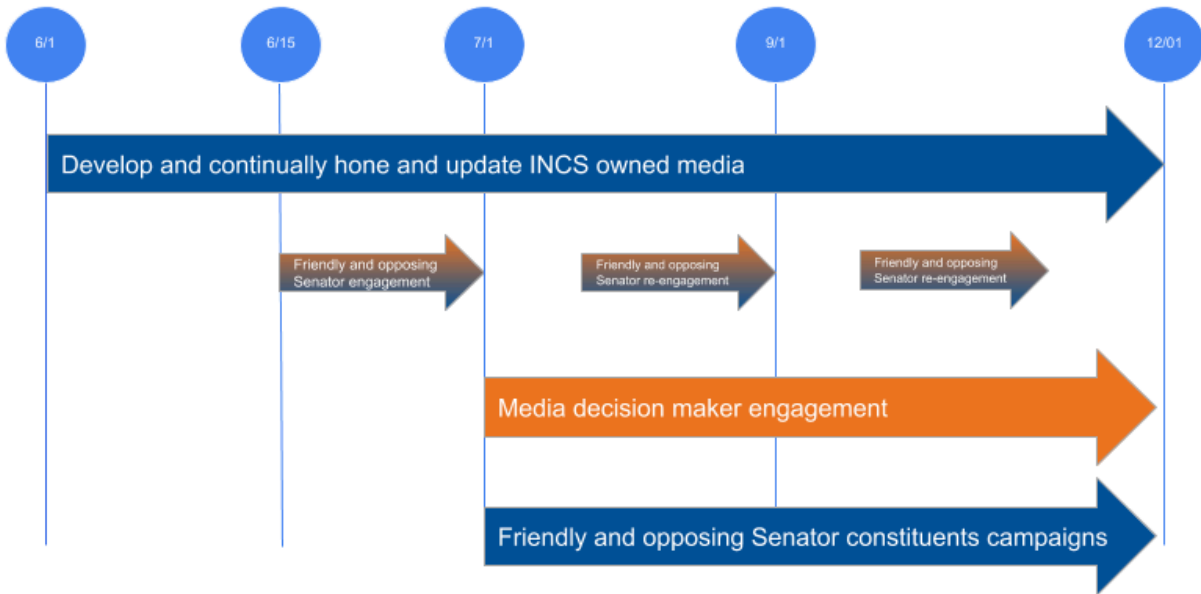
We have the following target audiences to reach, influence, and activate as part of **Operation #SaveOurSchools**:



- **Senators friendly to CSs:** Retaining their support is key to countering attempts to reduce CS funding
- **Senators opposed to CSs:** Offering a thoughtful appeal to soften if not reverse their stance is prudent
- **INCS stakeholders:** This is an all hands on deck priority initiative among the veritable army of CS administrators, staff, board members, teachers, parents, and students
- **Media decision makers (DMs):** It's critical to offer media orgs compelling content ideas to gain traction among TV and radio producers, print/digital editorial boards and reporters, and social and civic influencers in 2 basic groups, those from orgs in opposing Senator districts, and all others

- **Constituents of Senators who oppose CSs:** Appealing to the parents of school age and soon-to-be-school age children, Adults 28-54, and likely voters in upper age demos (Adults 55-65) could help the effort above, especially as elections approach. In a nutshell, the mission is to show them how Charter Schools - and school choice in general - are good for Illinois residents and have a positive effect on all schools in the short and long term in a number of ways, whether your child attends them or not.
- **Constituents of Senators who are friendly to CSs:** Bolstering support in CS-friendly districts by appealing to Adults 28-65

Tactics and timelines



To reach, influence, and activate the following target audiences, I propose these tactics:

- **Develop owned media** assets, resources, and processes:
 - **Clear organizational messaging**
 - **Website content:** Landing pages, FAQs, etc.
 - **Branded social media assets:** Headers and icons, post and campaign images, etc.
 - **E-newsletter** HTML template
 - **Revised digital publishing calendar**
- **Maintain strong relationships with Senators friendly to CSs** - Initial and ongoing outreach to Senators friendly to CSs via the following:
 - **Phone calls** to Senate offices

- **Letters/emails** to Senate offices thanking them for their continued support of CSs
- **Regularly-published INCS e-newsletters** to update them on INCS news and events, member school and student achievements, and important recent and upcoming milestones in the *#SaveOurSchools* mission, and to secure their continuing support
- **Attempt to influence Senators opposed to CSs** - Initial and ongoing outreach to Senators opposing CS funding via the following:
 - **Phone calls** from INCS stakeholders, friends, and allies to Senate offices and quarterly retouches or as opportunities dictate
 - **Letters / emails** from INCS stakeholders, friends, and allies of INCS to Senate offices
 - **Targeted media to constituents of Senators who oppose CSs**
 - **Earned media:** Phone, email, and social direct message outreach to DMs of TV, radio, and print/digital media orgs, as well as education and policy social influencers. Relevant story ideas include INCS countering the opposition to charter schools in general, INCS's reactions to opposition legislative milestones, and proactive stories about CS events, student awards, and school rankings and other CS recognition, as well as family / alumni success and lifestyle stories. We'll target the following earned media opportunities:
 - TV and radio public affairs, news, and morning shows
 - Feature story coverage, bylines, and regular publication of letters to the editor from our CEO, stakeholders, etc. by print and digital news and community orgs
 - INCS CEO / spokesperson podcast interviews
 - INCS inclusion in live event panel discussion and townhall forums sponsored by media orgs
 - **Paid media:** Ads with click-through to INCS landing pages on how to support CSs, positively reach out to opposing Senators, and opt in to the INCS email list:
 - **Social campaigns**
 - **Facebook boosted posts and ads** geo-targeted to districts. Content varies for our 2 primary demo groups.
 - **Twitter promoted tweets** geo-targeted to districts. Content varies for our 2 primary demo groups.
 - **Pinterest promoted pins** geo-targeted to districts
 - **PPC:** Google, Yahoo, and Bing Display Network placements, geo-targeted to districts with click-throughs to INCS landing pages to learn more and opt in to the INCS email list.
 - **Remarketing** campaigns after visiting INCSchools.org
 - **Video ads:** YouTube pre-roll and interstitial TrueView ads with

- click-throughs to INCS landing pages
 - **Radio** campaigns in opposing Senator districts
 - **Zoned cable TV** in opposing Senator districts
 - **Advertorials** in regional, local and specialty print and digital media
 - **Direct mail** to likely voters in opposing Senator districts in 20% increments (an additional 20% of voters in each district every month for 5 months, then re-evaluating based on trackable action metrics), with tracked CTAs to join the *#SaveOurSchools* movement at INCSchools.org
- Potential other tactics:
 - **Robo calls** to reach and influence likely voters in opposing Senator districts by telling our story and asking for their support
 - **Live events** / rallies in opposing Senate districts
 - **Bandit signs** in opposing Senator districts and on supporter lawns (“I support Charter Schools! *#SaveOurSchools*”) in select communities
- **Inform and mobilize INCS stakeholders** - Clear and consistent communications on how our parents, students, staff, board members, friends, and allies can do their part to help *#SaveOurSchools* via the following:
 - **Regularly-published custom e-newsletters** to update them on our mission, news, and how to help defend and support CSs in their local community and social networks, and inviting them to display lawn signs, bumper stickers, and use social media icons and headers to show they support CSs
 - **Social campaigns to custom social audiences** on Facebook, Twitter, etc. using parent email DBs

KPIs

The success of this strategic communications plan can be measured by aggregating and analyzing the following metrics on a weekly, monthly, and quarterly basis throughout these 3 stages:

Awareness

- Paid media: Social views and impressions
- Earned media: Total earned media opportunities (TV, radio, print, digital), Total earned media mentions, Total impressions

- Owned media: INCSchools.org's #SaveOurSchools landing page and total site traffic measured vs. YOY

Consideration

- Paid: View-through rates and watch times, YouTube subscribers and comments
- Earned: Backlink click-throughs and opt-ins to the #SaveOurSchools database from backlinks
- Owned: Time spent on site (landing pages, and total site measured vs. YOY), Bounce rate

Action

- Paid: Social shares, comments, and sign-ups
- Earned: Supporter database opt-ins
- Owned Media: Opt-ins to the #SaveOurSchools supporter database

Other KPIs:

- Legislative support growth or reduction for Senators who oppose CSs
- Attendance at live events (if applicable)

Action items

Content creation

- Create website content: SEO'd landing pages customized for each district with a Senator challenging CS funding and how supporters can positively and respectfully reach them
- Create custom visual assets for use in web and social content and campaigns. Assets include infographics as well as graphics that include Senator names, pictures, and district names and maps
- Review and reallocate FY 2020 marketing budget as needed
- Create special #SaveOurSchools media kit for distribution to media DM database
- Draft and hone talking points for INCS CEO, GA head, and other designated spokesperson (if needed) as well as senior INCS stakeholders
- Create sample templates for INCS stakeholder letters/emails/website contact form submissions and call script talking points to opposing Senators
- Create sample templates for INCS stakeholder letters/emails/website contact form submissions and call scripts talking points to local media outlets
- Create sample templates for INCS stakeholder social posts and encouragement to use the hashtag #SaveOurSchools
- Distribute stakeholder templates via www.INCSchools.org
- Create and regularly publish e-newsletter for INCS stakeholders, partners, and allies

- Include in INCS stakeholder-only e-newsletters info on where to find and how to effectively apply sample templates by using them as a framework they should personalize, and admonish them not to merely copy/paste them
- Create special *#SaveOurSchools* media kit

Engagement

- Engage CS-friendly Senators to secure their continued support (retouch quarterly or as needed)
- Engage CS-opposed Senators to invite them to revisit their stance (retouch quarterly or as needed)
- Engage media DMs in opposing Senate districts with special *#SaveOurSchools* media kit and initial story pitches, solicitation of INCS on public affairs and other shows (retouch monthly or as news cycle presents opportunities)
- Cross-promote earned media avails on media partners' social channels before and after INCS inclusion
- Plan and initiate paid media campaigns

Administrative processes

- Obtain Government Affairs Director and XFN approvals.
- Review the FY 2020 budget and select the appropriate tactics above based on available funding.
- Create process for capturing and archiving earned media audio, video, and text content for repurposing across all INCS channels (web, social, email, print, etc.)
- Open Adroll account (if needed) for remarketing campaigns on search engines, display networks, and social media, and install tracking pixels on full INCS Wordpress site and all special pages
- Create a YouTube channel (I see there's an INCS Vimeo channel, but YouTube is essential in 2020 :)
- Adjust existing FY 2020 web, social, and email publishing calendar
- Delegate above tasks to INCS personnel, vendors, and volunteers as needed until I can build and scale Communications team
- Aggregate metrics and analyze against KPIs, report to senior leadership bi-weekly

Organizational need #2: Sharing our story, shaping perceptions

INCS is in need of a powerful, decisive, and clear communications plan to positively shape public opinion and grow CS support, ward off potential attacks on CS funding, and build a solid foundation for potential expansion in the near and long term. The basic premise of the plan is to highlight and build sticky and measurable awareness of the achievements of our member schools, their teachers, students, and CS alumni. Dovetailing with these success stories, we'll also put forth a clear narrative about how we're working to improve CS schools over time, and how these improvements will impact the families and communities we serve.

Strategic objective

To meet this challenge, I propose INCS adopt the following strategic communications plan to:

- **Communicate** the benefits of CSs in general, and highlight the success stories of our member schools and highest achieving students, alumni, and teachers
- **Design** and implement an earned media communications plan to get traction and credibility through various broadcast and digital media sources
- **Brand** this effort to build a stronger public opinion of school choice in a sticky way using the general theme of "Freedom":

Example #1

Paid audio/video media assets can include students using the words:

I'm free to be whatever I want to be when I grow up!

I'm free to set goals, work hard, and make my dreams come true!

I'm free to choose the school that's right for me.

Thanks to you, I'm free! Please support my freedom to choose my school at INCSchools.org!

Examples #2 and #3



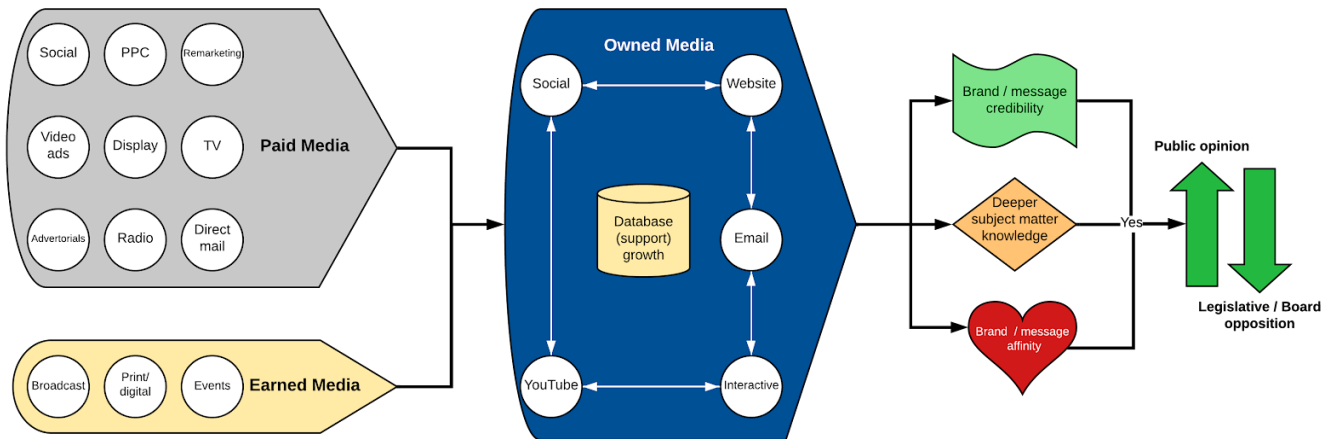
Target audiences

We have to reach, influence, and activate the following audiences in order to meet our KPIs:

- **INCS stakeholders:** We want to solicit the help of member school teachers, parents, and students to help spread the word and offer their success stories
- **Media decision makers (DMs):** It's critical to offer media orgs compelling content ideas to gain traction among TV and radio producers, print/digital editorial boards and reporters, and social and civic influencers
- **Members of the State Board of Education** that will absorb the powers of the dissolved State Charter School Commission as a result of the passage of Senate Bill 1226 into law
- **Legislators at the state and local levels**, including Governor Pritzker and Mayor Lightfoot: We need to hone our database of public officials that can affect CS approvals and funding in their jurisdictions. In a nutshell, it's essential to show them how Charter Schools - and school choice in general - are good for Illinois residents and have a positive effect on all schools in the short and long term in a number of ways, whether your child attends them or not.
- **Parents of students** in areas where INCS has identified an existing CS is vulnerable or with a potential need for a CS: Bolstering support in CS-friendly communities by appealing to Adults 28-65 years old.
- **Likely voters in upcoming state elections** where CS expansion and funding is most likely to be brought to a vote, either by school boards or by referendum: Bolstering support in CS-friendly districts by appealing to Adults 28-65.

Tactics

To reach, influence, and activate the following target audiences, I propose these tactics:



- **Develop owned media** assets, resources, channels, and processes, such as the following:
 - **Clear organizational messaging**
 - **Website content:** Informative and persuasive landing pages, FAQs, etc.
 - **Branded social media assets:** Headers and icons, post and campaign images, etc.
 - **E-newsletter** HTML template and repurposed website and social content with CTAs to drive traffic to other INCS owned media assets below
 - **An effective digital publishing calendar** for social and email content, raising awareness, but also with CTAs to support INCS and its member schools, share content, and proactively and positively turn their support of CSs into impactful action in their communities
 - **INCS podcast** distributed on Apple, Google, Stitcher, iHeart, Spotify and possibly through a media partner such as WGN, WLS, WVON, WIND, WBEZ, etc. We can highlight achievements, and also use this as a powerful way to engage with and influence legislators, school boards, civic leaders, and more by inviting them to appear as guests, which will also give us a way to appeal to their supporters and followers on social media, etc.
 - **YouTube** distribution of the INCS podcast and other assets created expressly for this mission, such as student/teacher success spotlights, school achievement recognition, CS and INCS event promos/recaps, and archives of the following...
 - **INCS-hosted interactive events and webinars** to educate parents and civic leaders about CS benefits, and provide an environment to respectfully engage with CS opponents to counter them and give the public a clear contrast between

their positions and ours.

- **Engage legislators at the state and local levels, members of the State Board of Education, the Chicago Public Schools, and Governor Pritzker -** Initial and ongoing outreach to legislators and board members via the following:
 - **Phone calls** to offices updating them on INCS member school achievements, events, etc., and asking them for their support
 - **Letters/emails** to offices imploring them to preserve CS funding and consider expansion to areas in need of CSs
 - **Regularly-published INCS e-newsletters** to update them on INCS news and events, member school and student achievements, important recent and upcoming milestones, solicit their support, and alert and invite them to participate in INCS owned media like podcasts and interactive events

- **Outbound campaigns to influence legislators, voters, and parents -** A steady stream of positive content across a multitude of channels:
 - **Phone calls** from friends and allies of INCS to legislative offices and quarterly retouches or as opportunities present themselves
 - **Letters/emails** from INCS friends and allies to legislative offices, school board members, and civic leaders in select communities
 - **Targeted campaigns** to the general public, focusing, first, on select communities where CSs are vulnerable or needed
 - **Earned media:** Phone, email, and social direct message outreach to DM databases of TV, radio, and print/digital media orgs, as well as relevant social influencers. Relevant story ideas include the opposition to charter schools in general, INCS's reactions to opposition legislative milestones, and proactive stories about CS events, student awards, and school rankings and other CS recognition, as well as family/alumni success and lifestyle stories. We'll target the following earned media opportunities:
 - Inclusion of CEO/spokesperson as a guest on TV and radio public affairs, news, and morning show
 - Feature story coverage, bylines, and regular publication of letters to the editor from our CEO, stakeholders, etc. by print and digital news and community orgs
 - Podcast interviews of CEO/spokesperson
 - INCS inclusion in live event panel discussion and townhall forums sponsored by media orgs
 - **Paid media:** Ads with CTA click-throughs to INCS landing pages on how to support CSs, opt-in to our email list to get info, and attend interactive events, webinars, and live events:
 - **Social** campaigns
 - **Facebook** (targeting Adults aged 28-65) boosted posts and ads geo-targeted to users in communities where a CS is vulnerable or needed.
 - **Twitter** (targeting 29-49 Adults) geo-targeted promoted

- tweets geo-targeted to users in communities where a CS is vulnerable or needed.
 - **Pinterest** (targeting 29-64 Women) geo-targeted promoted pins
 - **Tiktok Snapchat, and Instagram ads video ads, and interstitial and pre-roll audio ads on Spotify, Pandora, iHeart Radio, and more** targeting one of the most effective influencers of parents, *their children*, on the channels *they* prefer
 - **PPC:** Google, Yahoo, and Bing Display Network placements, geo-targeted with click-through to INCS landing pages to learn more and opt-in to our supporter email list
 - **Remarketing** campaigns
 - **Video ads:** YouTube pre-roll and interstitial TrueView ads with click-through to INCS landing page
 - **Radio** campaigns in or appealing to select communities
 - **Zoned cable TV** in select communities on select channel packages
 - **Advertorials** in local and specialty print and digital media
 - **Direct mail** to likely voters in communities where CS is either vulnerable or needed, with a CTA to learn more about CSs, attend a webinar, or interactive or live event, and support us at INCSchools.org
- Potential other tactics:
 - **Robo calls, voiced** by a few of our most successful CS admins, students/alumni, and most passionate parents to reach and influence likely voters, and directly asking for their support by joining our opt-in list at INCSchools.org
 - **Live events/supporter rallies** outside legislative offices in districts where we deem CSs are vulnerable or needed
 - **Bandit signs** near public schools and on supporter lawns (“I support kids’ right to choose their schools! #SchoolFreedom”) in select communities
- **Inform and mobilize INCS stakeholders** - Clear and consistent communications on how our affected parents, students, staff, board, friends, and allies can do their part to help positively shape the public perception of CSs via the following:
 - **Regularly-published custom e-newsletters** to update them on our mission, news, and how to help defend and support CSs in their local community and social networks, and inviting them to display lawn signs, bumper stickers, and use social media icons and headers to show they support CSs
 - **Social campaigns to custom social audiences** on Facebook, Twitter, etc. using parent email DBs

KPIs

The success of this mission can be measured by aggregated the following metrics on a weekly, monthly, and quarterly basis throughout these 3 stages:

Awareness

- Paid media: Social views and impressions
- Earned media: Total earned media opportunities (TV, radio, print, digital), Total earned media mentions, Total impressions
- Owned media: INCSchools.org's #SchoolFreedom landing pages and total site traffic

Consideration

- Paid: View-through rates and watch times, YouTube subscribers and comments
- Earned: Backlink click-throughs and opt-ins to the database from backlinks
- Owned: Time spent on site (landing pages, and total site measured vs. YOY), Bounce rate

Action

- Paid: Social shares, comments, and sign-ups
- Earned: Supporter database opt-ins
- Owned: Opt-ins to supporter database, attendees at interactive events/webinars

Other KPIs:

- Legislative/school board support + / -

Action items

Content creation

- Create website content: SEO'd landing and general web pages, student, teacher, and school success spotlights, etc.
- Create custom visual assets for use in web and social content and campaigns such as infographics, social images, graphics, and branding (headers, icons, templates, etc.), ads
- Review and reallocate FY 2020 marketing budget as needed
- Create/hone media kit for distribution to media DM database
- Draft and hone talking points for INCS CEO, GA head, and other designated spokesperson (if needed) as well as senior INCS stakeholders

- Create sample templates for INCS stakeholder letters/emails/website contact form submissions and call script talking points to use when contacting legislative and civic leaders we need to influence
- Create sample templates for INCS stakeholder letters/emails/website contact form submissions and call script talking points to use for their local media outlets (letters to the editor, calls to radio shows, etc.)
- Create sample templates for INCS stakeholder social posts using the hashtag *#SchoolFreedom*
- Distribute stakeholder templates via INCSchools.org
- Create and publish e-newsletter for INCS stakeholders, partners, and allies

Engagement

- Engage CS-friendly legislative and civic leaders to secure their continued support. Retouch quarterly or as needed.
- Engage legislative, school board officials, and civic leaders to revisit their stances or participate in live or interactive events. Retouch quarterly or as needed.
- Kick off earned media efforts by engaging media DMs with media kit and initial story pitches, solicitation of INCS on public affairs and other shows. Retouch monthly or as news cycle presents opportunities.
- Cross-promote earned media avails on media partners' social channels before and after INCS inclusion
- Plan and initiate paid media campaigns

Administrative processes

- Obtain Government Affairs Director and XFN approvals.
- Review the FY 2020 budget and select the appropriate tactics above based on available funding.
- Create process for capturing and archiving earned media audio, video, and text content for repurposing across all INCS channels (web, social, email, print, etc.)
- Open an Adroll account (if needed) for remarketing campaigns, and install tracking pixels on full www.INCSchools.org Wordpress site and all special pages
- Create a YouTube channel (I see there's an INCS Vimeo channel, but YouTube is essential :)
- Create an AudioGo account for placing ads on audio platforms such as Spotify, Pandora, iHeart Radio, TuneIn, and more.
- Apply KPI-based learning to plan FY 2021 web, social, and email publishing calendar and budgets
- Delegate above tasks to INCS personnel, vendors, and volunteers as needed until I can build and scale the Communications team
- Aggregate metrics and analyze against KPIs, report to senior leadership bi-weekly, and review quarterly and semi-annually

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