

JULY 3, 2015



COMMUNICATIONS

PROJECT COMMUNICATION PLAN

LEON AND THEA KOERNER AWARD ANNOUNCEMENT

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PROJECT COMMUNICATION PLAN

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PURPOSE

The Communication Plan outlines the strategy and methodologies to be used for project communications, information distribution, feedback and stakeholder management, and how these will be managed as The Leon and Thea Koerner Foundation transitions to The Leon and Thea Koerner Legacy Fund, funders of the Leon and Thea Koerner Award administered by the BC Arts Council.

The Communication Plan builds on previous work undertaken by the Legacy Advisory Working Group.

The plan will:

- Identify various audiences with interests or historical relationships with the Leon and Thea Koerner Foundation, and developing tools, materials and strategies to reach these disparate populations.
- Facilitate effective collaboration with Aqueduct Foundation and the BC Arts Council to establish the award as highly selective for unique and important work;
- Acknowledge the challenges of reaching and servicing a province-wide base of potential applicants and stakeholders in both the cultural and creative arts and social service communities
- Ensure that the importance of the Leon and Thea Koerner Award is understood;
- Further the Foundation's mission statement of “Strengthening BC communities by funding excellence and innovation in the arts and social services”;
- Ensure that the legacy of Leon and Thea Koerner is respected and acknowledged at every opportunity;
- Develop strategies that encourage applicants and recipients to share positive information about the new award.

OBJECTIVES

The objectives of the communication plan are to:

- share information and to create alignment with stakeholder messaging
- identify and develop a plan to inform key stakeholders
- assign responsibilities for project tasks and information
- manage stakeholder information
- maintain the focus of the Governors, Honorary Governors, staff, contractors, and external organizations with regard to the communication strategy.

SCOPE

This document will cover:

- Stakeholder Management – identification of project stakeholders, analysis of their requirements, and planning for their needs;
- Communication Planning - the communication and information needs of project stakeholders: Who needs what information, when, in what format, by what means and how to receive input and feedback and to create buy-in and ownership;
- Information Distribution - how information will be distributed to all stakeholders.

ASSUMPTIONS

The assumptions on which this the Communication Plan are based are:

- Communication activity has not yet commenced beyond the current Governors and Honorary Governors of the Foundation;
- The purpose and administration of the LTK Award and transition plans have been approved by Board of Governors;
- The BC Arts Council will be an active and enthusiastic partner in disseminating information regarding the specifics of the Award;
- This document is available to all Governors and Honorary Governors and other transition contractors and staff upon request.

CONSTRAINTS

The constraints on which this Communication Plan is based are:

- Currently, the Endowment Holder's place in the communications mix is unknown;
- Integrations of BC Arts Council Communications plans will be determined as timelines become more solid;
- Timeline is currently fluid, but it is hoped that activities may coincide with/enhance the 60th Anniversary celebrations.

COMMUNICATION TASK MANAGEMENT

Reporting to the Executive Committee of the Foundation's Board of Governors, Lancaster Communications will bear primary responsibility for executing the Communication Plan, with the assistance of the Executive Director and input from the Board. The primary contact at the Foundation is the Executive Director.

INFORMATION MANAGEMENT

MEETINGS

Regular meetings will be scheduled as MOU and Deed of Trust details are finalized.

Ad hoc or special meetings may be held to address key issues or activities that will impact success or progress. Decisions and actions from these meetings will to be reported via email to any affected parties.

Other meetings will be held as per the Communication Matrix.

REPORTS

A progress report will be submitted monthly, more frequently and/or informally as plans progress.

The Communication Matrix will be updated periodically to provide progress reporting and will provide updates against planned activities. These updates may include future activities, opportunities arising, changes required, or risk/issue identification.

DOCUMENT STORAGE

Final versions will be located at Lancaster Communications, and in the archives of The Leon and Thea Koerner Foundation.

COMMUNICATIONS MECHANISMS

Communication channels are the 'delivery mechanism' for sending messages to and receiving feedback from stakeholders. These may include, but are not limited to:

Presentations	Meetings	Informal Communications	Telephone Consultations
Email Bulletins	FAQs	Websites (internal and external)	External Media/Publicity
Letters	Information Packages	Social Media	Events

STAKEHOLDER MANAGEMENT

Stakeholder groups can be roughly divided into the following:

- a) Current grant recipients
 - i) arts sector recipients
 - ii) social service sector recipients
- b) Recent past recipients
 - i) arts sector recipients
 - ii) social service sector recipients
- c) Historical recipients (more than 5 years since last award)
- d) New applicants who would qualify under the new terms of the award
- e) Recent past Governors (individuals who remain in contact with the Foundation or otherwise take an interest in its activities)
- f) Past Governors (individuals who remain on a mailing list or database who have not been in touch in recent memory)
- g) The BC professional arts community
- h) The BC social services community
- i) Other foundations
- j) Media
- k) University of British Columbia community
- l) General public

THE MOST IMPORTANT MESSAGES TO COMMUNICATE:

- **the current situation and the rationale for the change**

Key Messages:

- Following a fundraising feasibility study, it was determined that The Leon and Thea Koerner Foundation could not continue to make awards at the current level and cover administrative costs, while continuing to meet CRA requirements, without accessing the capital of the Foundation.
- The size of the current LTKF endowment will soon reach a point where overhead and administration costs prompted diminishing value of the awards granted.
- This is a financially prudent and forward thinking move.

- After research, discussion, and study, the best way forward was determined to be the establishment of The Leon and Thea Koerner Legacy Fund, held by the Aqueduct Foundation, and created to fund the Leon and Thea Koerner Award, administered by the BC Arts Council.
- This change is being undertaken now to maximize the impact of the LTK Awards. It is the result of many years of thoughtful deliberation by the Board of Governors and Honorary Governors.
- The Award is highly selective for unique and important work
- Award is a positive change.
- The purpose of the LTK Award is in keeping with Leon and Thea Koerner's original intent when establishing the Foundation
- The rationale of the LTK Award is in keeping with the Foundation's mission statement: "Strengthening BC communities by funding excellence and innovation in the arts and social services."
- This action will keep the legacy of Leon and Thea Koerner alive into perpetuity.
- This significant award will lead to social change or community transformation through collaboration between professional arts and social service organizations.

- **the basics of what is changing, how it will change, and when it will change**

Key Messages:

- There will be one final intake of grant applications in March 2015 for funding from The Leon and Thea Koerner Foundation.
- Following that, communications efforts as outlined in this document will begin in earnest.
- BC Arts Council will communicate and administer applications, deadlines, general promotion of the LTK Award to the community, and coordinate the peer review process
- Only projects that combine professional arts with social services will be eligible to receive the new LTK Award
- In or after 2016, up to three awards of an amount of no less than \$25,000 will be awarded to BC arts and social service organizations who collaborate on projects that will create lasting benefit to communities located throughout BC. The average size of an LTKF grant is \$10,000.
- In or after 2016, there will be fewer recipients of awards than there were through The Leon and Thea Koerner Foundation.

- **the expectation that change will happen and has been discussed and approved**

Key Messages:

- The Legacy Advisory Working Group was struck and due diligence was undertaken to guarantee the funds of The Leon and Thea Koerner Legacy Fund into perpetuity. The Board of Governors wholeheartedly support this approach.
- This structure of the LTK Award funded by an endowment is one that, although unprecedented in BC, has been successfully implemented at the national level. The LTK Award represents innovation in purpose coupled with fiscal responsibility.

- **specific activities expected to benefit from the change**

Key Messages:

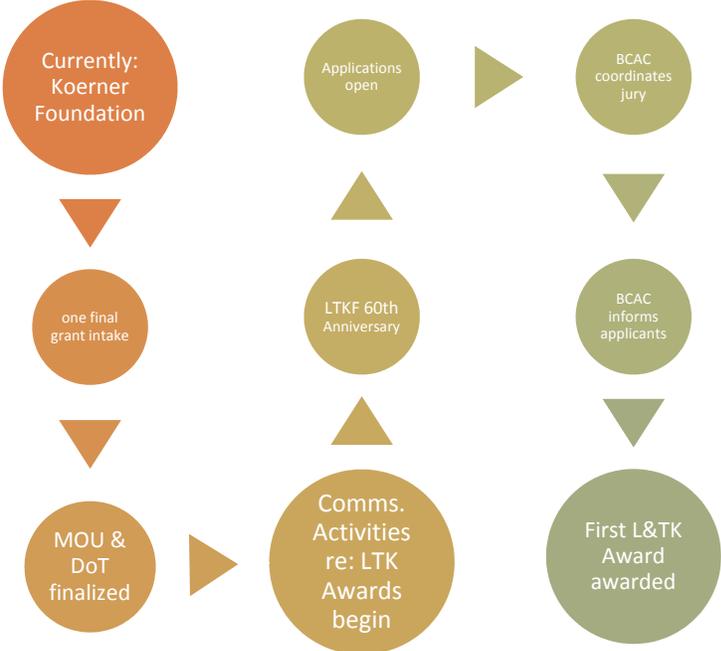
- Professional arts-based organizations and community social services agencies will work together on projects that create long-term benefits for BC's communities.
- Larger-scale or more resource-intensive projects will receive more substantial funding than in the past.
- The legacy of Leon and Thea Koerner will be honoured into perpetuity by the establishment of the LTK Award.

- **a vision of the organization after the change takes place**

Key Messages:

- The Leon and Thea Koerner Foundation has evolved into a partnership between the BC Arts Council, the Aqueduct Foundation, and an LTK Fund advisory committee which includes Koerner Family members.

CHANGE ACTIVITY FLOW



MEASURES OF SUCCESS

As time passes, the Leon and Thea Koerner Award's communications success can be evaluated using the following:

- **Activity.** How many applicants or projects applied? Does that number increase over time? Has one approach generated the bulk of activity? Are the media interested? Are more applications coming from the arts sector, or the social services sector?
- **Reach.** How far did news of the award reach geographically? Did any large media outlets pick up the story? Is the non-profit community (arts and social services) disseminating information through existing networks?
- **Engagement.** Are people in the community talking positively about the LTK Award? Is there chatter on social media? Are people sharing news about it? Once projects are produced, are they attracting notice from the arts/social services community? The general public? Other funders? The media?
- **Impact.** Have projects that are funded resulted in the desired change, or social transformation? Is there full understanding and acceptance of the new criteria and structure?

ONGOING QUESTIONS FOR INTERNAL DISCUSSION & CLARIFICATION

Note: This section especially is a living document and will undergo frequent revision and clarification over time. These questions primarily exist to keep these issues top-of-mind as the Communications Consultant begins to work in earnest. Answers are not necessarily a part of this document.

What will become of the existing LTKF communications pieces (website, email addresses, etc.) as time passes? Will there be resources allocated to keeping information current, or is it worth considering developing a schedule for regular updates?

What are the plans for develop a visual identity and brand for the award?

What plans does the BCAC have for promoting the award in both the arts and social services communities? What assistance can the Foundation provide to do this effectively?

Might it be possible to leverage some positive press by collaborating with the Aqueduct Foundation?

Would creating a social media presence for the award solve or create communications issues?

What is the longer-term goal in promoting the award? How hands-on would the LTK Fund Advisory Committee like to be (eg. a curtain speech or welcome message for successful projects?)

What kind of database does the Foundation currently maintain? How well segmented could lists of past recipients get (by date? by amount? by frequency of award?)

COMMUNICATIONS MATRIX

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
2014 recipients-arts	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p> <p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p>	<p>Personal letter</p> <p>FAQ*</p> <p>Web site</p> <p>Earned Media</p> <p>Meetings w/key recipients</p> <p>Presentations**</p> <p>Events</p>	<p>EL/SHC</p> <p>EL</p> <p>EL w/assistance</p> <p>EL</p> <p>SHC/Board</p> <p>TBC</p> <p>Various/SCH/Committee/EL to assist</p>	<p>Late June, post 22nd</p> <p>Early May</p> <p>Early May</p> <p>Release sent May 7</p> <p>Ongoing May-June</p> <p>As confirmed, throughout spring</p> <p>May 6 confirmed</p>
2014 recipients-social services	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original</p>	<p>Personal letter</p> <p>FAQ*</p> <p>Web site</p> <p>Earned Media</p>	<p>EL/SHC</p> <p>EL</p> <p>EL w/assistance</p> <p>EL</p>	<p>Late June</p> <p>Early May</p> <p>Early May</p> <p>Release May 7</p>

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
	<p>intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p> <p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p>	<p>Meetings w/key recipients</p> <p>Presentations</p> <p>Events</p>	<p>SHC/Board</p> <p>TBC</p> <p>Various/SCH/Committee/EL to assist</p>	<p>May/June</p> <p>TBC</p> <p>May 6 confirmed</p>
<p>2010-2013 recipients-arts (Lower Mainland-based)</p>	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p>	<p>FAQ*</p> <p>Web site</p> <p>Earned Media</p> <p>Presentations</p>	<p>EL</p> <p>EL w/assistance</p> <p>EL</p> <p>tbc</p>	<p>May</p> <p>Early May</p> <p>Release May 7</p> <p>As confirmed, throughout the spring</p>

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
	<p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p>			
2010-2013 recipients-arts (outside Lower Mainland)	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p> <p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p>	<p>Personal letter</p> <p>FAQ*</p> <p>Web site</p> <p>Earned Media</p> <p>Presentations</p>	<p>EL/SHC</p> <p>EL</p> <p>EL w/assistance</p> <p>EL</p> <p>tbc</p>	<p>Late June</p> <p>May</p> <p>Early May</p> <p>Release May 7</p> <p>As confirmed, throughout the spring</p>
2010-2013 recipients-social services	<p>Award fulfils the mission statement of the LTKF:</p>	<p>Personal letter</p> <p>FAQ*</p>	<p>EL/SHC</p> <p>EL</p>	<p>Late June</p> <p>Early May</p>

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
	<p>Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p> <p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p>	<p>Web site</p> <p>Earned Media</p> <p>Presentations</p>	<p>EL w/assistance</p> <p>EL</p> <p>tbc</p>	<p>Late March, early April</p> <p>April</p> <p>As confirmed, throughout the spring</p>
Historical Recipients	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective</p>	<p>FAQ</p> <p>Web site</p> <p>Earned Media</p> <p>Letter, at discretion of SHC</p>	<p>EL/SHC</p> <p>EL</p> <p>EL w/assistance</p> <p>EL/SHC</p>	<p>Early May</p> <p>Early May</p> <p>Release May 7</p> <p>Late June</p>

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
	<p>for unique and important work</p> <p>The Foundation is moving on to the next phase of existence, and this is the prudent, innovative thing to do.</p> <p>The new Award will create real value for BC Communities.</p>			
Past Governors-active	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>The Foundation is moving on to the next phase of existence, and this is the prudent, innovative thing to do.</p> <p>The Board of Governors worked diligently to ensure this step forward was fully considered and properly executed.</p> <p>The Koerner's legacy will be</p>	<p>Letter</p> <p>Meeting/phone call</p>	<p>EL/SHC</p> <p>SHC/Board</p>	<p>Late June</p> <p>Early May</p>

Target Audience	Key Messages	Channels	Responsible	Timing and Frequency
	honoured in perpetuity, in a meaningful way that will enhance BC communities.			
Past Governors-inactive	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>The Foundation is moving on to the next phase of existence, and this is the prudent, innovative thing to do.</p> <p>The Board of Governors worked diligently to ensure this step forward was fully considered and properly executed.</p> <p>Leon and TheaKoerner's legacy will be honoured in perpetuity, in a meaningful way that will enhance BC communities.</p>	Letter	EL/SHC	Late June

<p>Arts Community - general</p>	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award is a positive change.</p> <p>Award is long-term.</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p> <p>The Award is open to professional not-for-profit arts companies and social services organizations from BC communities</p>	<p>Presentations</p> <p>Events</p> <p>FAQ*</p> <p>Web site</p> <p>BCAC channels</p> <p>Word of Mouth</p>	<p>tbc</p> <p>tbc</p> <p>EL</p> <p>EL w/assistance</p> <p>BCAC w/EL</p>	<p>As confirmed</p> <p>As confirmed</p> <p>Early May</p> <p>Early May</p> <p>Tbc, post May 6</p>
<p>Social Service Community - general</p>	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea</p>	<p>Presentations</p> <p>Events</p> <p>FAQ*</p> <p>Web site</p>	<p>tbc</p> <p>tbc</p> <p>EL</p> <p>EL w/assistance</p>	<p>As confirmed</p> <p>As confirmed</p> <p>Early May</p> <p>Early May</p>

	<p>Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>Award will result in larger-scale, more meaningful projects.</p> <p>Award is open to applicants province-wide.</p> <p>The Award is open to professional not-for-profit arts companies and social services organizations from BC communities</p>	<p>BCAC Channels</p> <p>Word of Mouth</p>	<p>BCAC w/EL</p>	<p>Tbc, post May 6</p>
<p>Other Foundations</p>	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>This innovative approach to</p>	<p>FAQ</p> <p>Web Site</p> <p>Via professional association newsletters and sites</p>	<p>EL</p> <p>EL w/assistance</p> <p>SHC, EL</p>	<p>Early May</p> <p>May</p> <p>May</p>

	Family Fund management is worth considering to ensure a lasting legacy that fulfils the original foundation's purpose.			
Government	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>This innovative approach to interdisciplinary funding will result in real social change in the eligible communities.</p>	<p>Event</p> <p>Earned Media</p>	<p>BCAC w/EL/SHC</p> <p>EL/ SHC/board</p>	<p>Speaking briefly at May 6 event</p> <p>Separate event tbc</p> <p>Release out 7, cooperative releases tbc</p>
UBC Community	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p>	<p>Earned Media</p> <p>Personal connection</p>	<p>EL</p> <p>SHC</p>	<p>Release out May 7</p>

	<p>The Award is highly selective for unique and important work</p> <p>This change is forward-looking, innovative, and in keeping with the spirit of Leon and Thea Koerner.</p>			
<p>Media (3x areas of focus: Arts, social issues, business)</p>	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>This is a new, different way to fund partnerships between the arts and social services that will create a lasting benefit to the province.</p> <p>These awards are highly selective for unique and important work, and of significant value.</p> <p>BCAC was selected to administer the awards because of track record of efficiency and</p>	<p>Media Release</p> <p>Phone call</p> <p>Earned media</p> <p>Events</p>	<p>EL</p> <p>EL</p> <p>EL</p> <p>Tbc</p> <p>3 x spokespeople:</p> <p>Arts=Lorna Brown</p> <p>Social issues: Jennifer Johnstone</p> <p>Business: Peter Ladner</p>	<p>Release out May 7</p> <p>Post May 7</p> <p>Timed to release</p> <p>tbc</p>

	experience with peer jury processes.			
General Public	<p>Award fulfils the mission statement of the LTKF: Strengthening BC Communities</p> <p>Award reflects the original intent of Leon and Thea Koerner when they established the Foundation in 1955</p> <p>Award is for significant collaborative projects between the arts and social services</p> <p>The Award is highly selective for unique and important work</p> <p>This is a new, different way to fund partnerships between the arts and social services that will create a lasting benefit to the province.</p> <p>These awards are highly selective for unique and important work, and of significant value.</p>	<p>Earned Media</p> <p>Web Site</p> <p>Word of Mouth</p>	<p>EL</p> <p>EL w/assistance</p>	<p>Release May 7</p> <p>May</p>

NOTES:

*FAQs tailored to community. Five variations: Arts, Social Service, UBC, Media, General

**Presentations to service organizations (ie. Alliance for Arts and Culture, etc.) may capture multiple categories

All Timing assumes that things proceed according to plan, and can be adjusted to suit circumstances.

Social Media could play a big part in word-of-mouth--we should at least set up ways to monitor social media traffic.

