Best Practices Roundtable Notes

1. What are the different ways that other agencies respect patient confidentiality while sharing meaningful stories with other stakeholders?

Various agencies have new participant protocols that include permission for use of images and story in marketing communications. These are the default, so that every child is covered by a release. One participant described how a blanket release requirement made image collection easier, because staff just has to screen out the clients who don't want their images used, which is a small number. While many agencies use blanket agreements, there are differing practices between perpetual releases (which don't have an end date); and releases that are date-specific. Recommendation is for communications staff to think carefully about the latter, since the team often used images from earlier times that may fall outside of the permission window.

Blanket releases are recognized as insufficient for certain media campaigns that prominently features intimate details. In those instances, the agency will talk to parents/participants to describe the campaign and get specific information. Many agencies have found that these detailed conversations have led to better stories – it's a way of identifying people who want to be seen/heard/have their stories told. One agency described how they ask parents to write their family stories – these stories have a unique point of view and level of detail, and are very effective for outreach to donors and other clients. One agency described this practices as being the best reflection of the strength of the relationship between agency and participant – if a participant is eager to describe how they've benefited from the service, it means they're satisfied.

One agency has an annual family meeting, and one of the activities at that event is asking parents to share their detailed stories – within the context that the stories will be used to generate interest in the program.

Everyone agreed that client privacy protection is paramount, and described additional measures such as using only initials or pseudonyms, screening out identifying details, etc.

There was also broad agreement that absent specific permission, agencies should steer away from using images or details about individuals.

One challenge with personal stories is to strike the right balance between personal details and keeping a story intact, without revealing too much about the family. The recommendation was to interview family members formally – to elicit details and then build a story, with the active participation by the families.

2. What types of stories work?

Universal agreement that photos and videos are super important for conveying the message of the agency.

Having the clients describe their experience makes the message more vivid and immediate, likely that new participants will want to learn more about the agency. Photos also sidestep the difficulty of achieving the "right' balance of narrative and imagery – photos expose the story without words.

3. How do you know when something's right/ going to work?

GOOSEBUMPS – if your staff has a physical response to the image/story, unless it's bad, then it's likely to be terrific.

Measurement – pay attention to what people are doing with the information you send them (digital reporting on opens/reviewed/hashtags/followers). Most important is how people are responding to your outreach – are they donating? Joining?

Address the pain point – clearly address how your agency is a change force for the audience/participants/market – it's important to find a relatable way to communicate about client difficulties, and there's an important balance between sharing someone's pain and creating a connection to a diverse person.

DON'T SAY "INSPIRATIONAL" – vehement agreement that people, especially adults, don't want to be referred to as inspirational – so writers have to try to demonstrate how a participant is able to overcome a life challenge, without naming them as inspirational. If you have to use description words, try transformative or other adjectives.

"I want to be able to chase cats in the barn" was a great example of a best practice, used by the Spina Bifida organization to promote their Go Baby Go mini cars. This tagline received strong responses, and all the roundtable people agreed – it was visual, aspirational, humanizes the desire of their child clients to be kids, super relatable because many people want to race a sports car, highlights joy rather than sadness, and addresses a disability obliquely.

Emotional connection matters - so communications teams need to understand what the audience wants. Visual is best – candids over formal portraits, snapshots of casual moments that capture what an agency does are best. Staff should try to capture the moments that the agency does best. One agency has a habit of celebrating small successes on the last Friday of every month.

Take reasonable chances to build emotional connection - another agency had a success story – they usually focus on kids, but on one occasion they brought two adults to a high school presentation – and it turned out powerfully, because the adults were happy to talk about their lives, and the authenticity of their stories resonated with the student groups so much that the agency was asked to return. (this was the agency who helps autistic people with employment)

CELEBRATE! Participants love imagery that notes their progress/success, and audiences love to see the happy endings.

4. Failures?

    One roundtable participant had just had a "flop" when they spoke to a corporate organization. The room wasn't ready for the material, and the speaker focused on efficiency but didn't have the correct content to grab the audience. Message? Know your audience and anticipate needing some introduction for a group that's unfamiliar with your agency's perspective.

    Another agency got sideways with an audience by talking about legislative issues to an audience that was concerned about the soft issues, not legislative details. Message – information is important, and graphics, but you have to balance and determine whether you're providing insights that the audience seeks.

    Inclusion language – this was a hot issue in both roundtable groups. We talked about how much and how quickly word choice is changing, and how difficult it is to keep pace. It's especially challenging when speaking with donors, who may not have deep industry relationships and may be unaware that certain words/phrases aren't acceptable any more. There was robust agreement that the communications team has to be mindful of the audience and bringing them along without making them feel bad for using an unacceptable word. One advice – let audiences know that it's okay not to know what the "right" word is – after validating their ignorance, teach them.

    There was a lot of discussion about what to do with people who use the wrong word – participants agreed that it's important to pay attention to your instinct in calculating whether someone's being ignorant or intentionally offensive. There was some discussion about how to correct people – recognized as totally situation-dependent and touchy.

    (NOTE – Lauren from the Nora Project offered to share her "Inclusion 101 Language" presentation for anyone who needs training and what/how to refer to clients.)