

Institute *for* Media, Policy *and* Civil Society

Marketing and Communications Plan: 2004-2005

Bulkley Valley Centre for Natural Resources Research and Management

FINAL

Prepared by IMPACS Communication Centre

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TABLE OF CONTENTS

INTRODUCTION.....	3
METHODS	4
BULKLEY VALLEY CENTRE SERVICES.....	5
DEFINING SUCCESS.....	6
1. Increase overall funding	6
2. Diversify funding sources.	6
3. Expand infrastructure	7
4. Expand membership.....	7
5. Expand services.....	7
6. Build profile, demonstrate success and credibility:.....	6
7. Expand geographic reach	8
SITUATION ANALYSIS.....	8
Communication Assets.....	8
Communication Challenges	9
External Challenges.....	12
External Opportunities	14
TARGET AUDIENCES	16
BC resource ministries and regional initiatives	16
Federal government departments and initiatives	17
International Conservation Groups.....	17
Potential members	18
KEY MESSAGES	18
The Bulkley Valley Centre's "Unique Selling Proposition"	19
Tailoring the Centre's Messages.....	19
Bundling Interdisciplinary Services	20
MARKETING STRATEGIES	21
Support face-to-face communications with collateral materials and images.....	21
Increase exposure at key conferences.....	22
Increase exposure through key media	23
Increase exposure through key scientific publications & trade journals	23
Increase credibility & reach through strategic membership recruitment.....	23
OTHER COMMUNICATION STRATEGIES.....	24
Strengthen credibility through quality standards & screens:	24
Increase credibility to potential First Nation Clients.....	24
APPENDIX 1: PRELIMINARY LIST OF POTENTIAL WEB LINKS.....	25
APPENDIX 2: 10 TIPS FOR SUCCESSFUL MEDIA INTERVIEWS	26

Introduction

The Bulkley Valley Centre for Natural Resources Research and Management is a new not-for-profit research organization, focused on sustainable resources in temperate, montane and boreal ecosystems. The Centre is based in the community of Smithers, B.C., in the heart of a region encompassing all three ecosystems (both terrestrial and aquatic). Once a thriving regional government centre, Smithers is home to a unique range of skilled professional consultants, policy-makers, researchers and scientists. The Centre was formed by a talented group of such men and women in the resource management sector.

Recent government budget cuts were an impetus for the creation of the centre. Despite government downsizing, scientific research and policy skills are still needed (and some continue to be contracted out by government agencies) in the region's resource-based economy. Other opportunities for such ecosystem-based research are opening up outside of the region as well. The Centre's founders therefore seized the opportunity to pool and coordinate the unique, multi-disciplinary skills housed in the region. By working together proactively, while maintaining and building upon existing long-term data and knowledge of the local ecosystems, they realized that they could offer a collaborative research centre whose whole is definitely greater than the sum of its parts.

As a registered charity, the Centre is able to seek foundation funding, government grants (both federal and provincial), and fee-for-service contracts. Members, who pay an annual fee and have voting privileges in terms of the Board of Directors, are given preference over other consultants when responding to the Centre's own requests for proposals.

Having just hired its first Executive Director (at one day a week) and an Administrative Assistant, the Centre now needs to grow, and to become established with a range of audiences, or "markets". It faces competition, either directly or indirectly, for profile and positioning, and for limited resources. In order to strengthen the Centre's positioning, it needs to clarify its niche, core services, unique qualities and assets. The Centre also needs to simply raise its profile, so that potential markets (funders, partners) and new research associates are aware of its existence, on regional, national and international scales. Meanwhile, the Centre needs to strengthen its own ties to the local community and clarify its role and aspirations.

This marketing plan is aimed at achieving these broad goals.

Methods

Several steps were taken in the development of this plan. These are outlined briefly below:

- Review of the Centre website (www.bvcentre.ca), prospectus, financial statements, and other documents
- Development of an on-line survey of eight Directors and allies conducted in March 2004, to which eight people responded
- Telephone interviews with Kevin Kriese (now the part-time Executive Director), and Board Directors Brian Edmison and Sybille Haeussler
- Brief research into some potential foundation funding sources
- Preparation of a session guide and agenda for a face-to-face planning session
- Facilitation and note-taking for a full day face-to-face session in Smithers on May 18, 2004 with approximately 12 directors
- Preparation of detailed minutes from that session
- Liaising with Executive Director on specific questions
- On-line review of potential website links for the Centre (See Appendix 1)
- Research into potential conferences at which the Centre may benefit from attending (attached separately)
- Preliminary list of scientific journals in which the Centre could consider publishing (attached separately)
- Preparation of Canadian mainstream media list (attached separately)

Bulkley Valley Centre Services

The Centre has identified credibility as being perhaps its single most important marketing quality. At the same time, it is a democratic, membership-based organization. As such, majority groups of members will be able to elect various board members who may have strong biases toward, for example, advocacy research or research that supports industrial resource extraction.

In order to bolster its credibility, the Centre is in the process of developing specific benchmarks to guide the quality of its research or outreach activities. The Directors are also developing screens that will clarify both the kinds of research, and the kinds of clients, partners, associates or funders that the Centre can work with to maintain and strengthen its credibility. Meanwhile, some basic parameters were established at the May planning session:

BULKELY VALLEY CENTRE SERVICES	
What we do	What we don't do
Sustainable resource management research	Inventories (unless they address a specific research question)
New, innovative or unique research	Duplicate existing research & structures
Monitoring for effectiveness	Monitoring for compliance or implementation for resource managers or developers, or environmental impact assessment
Applied research – testing hypotheses where the results can be applied to current resource management. Work with partners that implement.	Purely theoretical research with no application or likelihood of implementation
Scientific testing of land and resource use practices, or assumptions of practices	Environmental impact assessment for project proponents (unless research is aimed at generating alternative scenarios or exploring hypotheses)
Neutral research	Advocacy research
Credible, quality research	Poor quality, substandard research
Boreal, temperate, montane ecosystems – <u>including</u> watersheds, wetlands, alpine areas, fisheries, and endangered species	<i>Only</i> forest-related research (vs. a range of ecosystem-related topics)
Public outreach	Unpublished, or publicly unavailable research
Brokering and convenience. Co-ordinate, facilitate complex projects. One stop shopping for outstanding multidisciplinary research teams.	Competition with consultants and reduce available research opportunities and funding support for them.

Defining Success

Through the survey and face-to-face session, Directors identified several overarching marketing objectives for the organization. These include preliminary benchmarks, based on a strategic plan that was developed in March 2003. The benchmarks will be updated in a revised strategic plan.

1. Build profile, demonstrate success and credibility:

The Centre needs to strengthen its position, but also to ensure its position is known. Within the scientific research community, there are several ways of measuring profile.

Again, many of these also constitute strategies in their own right. Achieving these benchmarks will clearly advance both the Centre's positioning and the likelihood that it will become better-known to a wider audience.

Marketing Objectives

1. Build credibility and profile
2. Increase overall funding
3. Diversify funding sources
4. Expand infrastructure
5. Expand membership
6. Expand services
7. Expand geographic reach

Benchmarks:

- Over the next 6 months:
 - Develop and implement research quality standards, including a process for peer review of all projects
- Over the next 24 months:
 - publish one research paper in a top-level, peer-reviewed scientific journal
 - be invited to speak at a high-profile conference (representing the Centre)
 - host a conference attracting national and international interest
 - deliver a high level of client satisfaction on all projects, based on the quality assurance standards and an associated monitoring system that the Centre is in the process of developing

2. Increase overall funding

Currently, the Centre has a budget of approximately \$500,000 – a significant sum for a new organization. However, in order to meet its interdisciplinary mission, additional financial growth is critical. At least \$200,000 more in core funding is needed, in order to maintain operations, market services and expand infrastructure and assets.

Benchmarks:

- Over the next 12 months: raise \$1.2 million
- Over the next 24 months: raise \$1.7 million

3. Diversify funding sources

The Centre seeks not only absolute amounts of funding, but a diversity of funding sources. In this way, it will be more resilient to change within any single funding source. It may also have greater credibility with some audiences.

Benchmarks:

- Over the next 12 months:
 - gain one contract or grant from one new, non-governmental funding source
 - gain three new research contracts from regional offices of BC government
 - gain one new research contract from a First Nation organization
- Over the next 2 years:
 - gain one research project partnership from a major national funding source such as NSERC
 - gain one research project partnership from a major international funding source

4. Expand infrastructure

Benchmark:

- Hire one to two staff [note that since May, the Centre has hired Kevin Kriese as a part-time Executive Director, and Kirsteen Laing as the Administrative Assistant.]

5. Expand membership

While expanding membership is an objective, it is also a strategy that will help the Centre achieve its other goals. Expanding membership will provide the Centre with increased profile and credibility, and will increase the pool of talent from which it can draw to deliver projects.

Benchmarks:

- Increase the number of members by 50%, from the current 50, to 75 by March 2005
- increase the number of “Sustaining Members” by 50%, from the current four, to six by March 2005

6. Expand services

The Centre needs to expand the network of researchers that can help deliver the organizational promise of truly collaborative, interdisciplinary research.

Benchmarks:

- Over the next 24 months, conduct one project with socio-economic dimensions
- Over the next 12 months, conduct one project with formal endorsement from, or possibly outright partnership with, at least one First Nation organization

8. Expand geographic reach

The Bulkley Valley Centre has a strong presence in Smithers. However, its expertise extends throughout Northwest BC, and potentially across similar ecosystems elsewhere in the world. For example, market opportunities for the Centre's expertise in boreal research may exist in northern Europe, Russia, or other Canadian boreal regions. The Centre needs to expand its network of researchers and members in North-west B.C., as well as to increase its presence outside of the region.

Benchmarks:

- Over the next 12 months:
 - of the 25 new members being sought, 10 will be located outside of Smithers
 - at least five target websites will show links to the Centre's website. [Note: for a preliminary list of websites the Centre may consider either linking to, or being linked on, see Appendix 1]
 - at least two conference speaking opportunities will be offered outside of the Smithers region.
 - The BV Centre will present posters at three conferences or workshops in British Columbia

Situation Analysis

Communication Assets

The Centre has a number of strengths from a marketing and communications perspective:

Location

The Centre, and most of its research associates and Directors, are located in close proximity (1.5 hour drive) to a range of remarkably intact northern temperate, montane, boreal, and coastal ecosystems. At the same time, because Smithers is a hub of regional governance, the Centre is located in close proximity to regional decision-makers, looking to fund or commission research. It has excellent relationships with a range of decision-makers, and is connected to a highly cooperative, supportive professional community. Also, the Centre is located in proximity to a number of land-use planning processes, all of which require resource management research.

Research Skills

Through its directors, staff, and members, the Centre houses a diverse range of scientists, researchers & policy analysts skilled in various social, ecological, geophysical and technical areas. The Centre can therefore quickly organize collaborative, interdisciplinary teams able to address complex ecosystem research projects. As well, the Centre has the opportunity to "pre-package" these skills into interdisciplinary bundles, or teams, to appeal to particular market needs. Individual specialties among Centre members are outlined below:

Bulkley Valley Centre Specialties		
• Ecosystem disturbance	• Silviculture	• Economics
• Ecosystem restoration	• Botany	• Soil
• Landscape ecology	• Fisheries	• Geology
• Wildlife – particularly owls, goshawks, seabirds, grizzly bears, mountain goats and caribou	• Aquatic biology	• Geomorphology
• Land-use planning	• Hydrology	• Project management
• GIS planning systems	• Pathology (trees, ecosystems)	• Spatial-temporal modeling
	• Entomology	• Policy

Track record

Although just two years old, the Centre also has an excellent track record in terms of research projects completed or underway. So far, its contracts and grants amount to nearly \$600,000. The Centre also has a membership base of 50 -- located mainly, but not entirely, in the region -- with good growth potential. Continuity, in terms of historical knowledge and access to regional scientific databases, is another asset. Extensive ecosystem classifications have already been completed in the region, and databases exist containing scientific information dating back several decades. Such data are essential for tracking long-term ecosystem changes due to climate change, for example.

Positioning

The Centre is well-positioned in terms of the reputation and networks of many of its directors and members. Because of its members' extensive "on-the-ground" experience in government and private consulting, the Centre may be positioned to respond to research opportunities, and to complete projects, with unusual speed and flexibility. This is not always the case with academic institutions, for example, which tend to work extensively with untrained students, and which often complete projects -- and publish their results -- very slowly.

Communications assets

Finally, the Centre has an excellent website, with information (such as RFPs, event announcements and news on projects) likely to encourage audiences to return to the site over time. The Centre does a good job, considering its limited resources, in keeping its website current. It has some strong writing and public speaking skills. The Centre also has access to outstanding photographic images. However, it currently has no aggregate image bank, so that many of these images are not readily accessible.

Communication Challenges

The Bulkley Valley Centre also faces a number of internal challenges.

Getting the house in order

While Centre's emerging, positive track record is one of its assets, these are still "early days". In this start-up period, the Centre will need to carefully build and maintain its reputation. It will need to demonstrate its ability to deliver quality research in a timely fashion, and to do

effective public outreach of research results. Yet the core parameters that will guide the quality of the Centre's work – and its reputation – are not yet firmly defined. The organization's internal research priorities are not yet complete, nor are the parameters of its mission and mandate (though some of the basic parameters are described above under "Bulkley Valley Centre Services".)

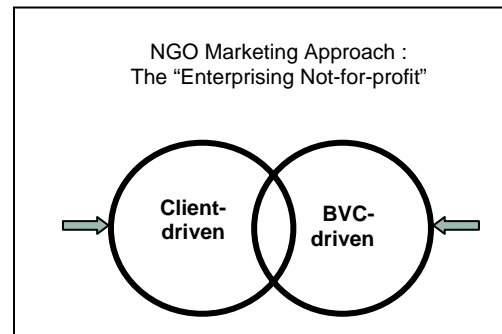
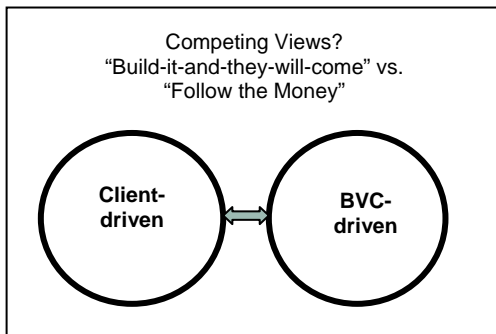
The Marketing mind-set

The Centre faces several specific internal marketing challenges. One is that the Centre's market knowledge (i.e., its understanding of what external market opportunities are) is still incomplete. Another challenge is that communication skills and confidence need to be strengthened within the organization.

" ... some of us are uncomfortable in the non-scientific role of marketing, whereas others are game to try, but don't know how to go about it. "

– survey respondent

A third challenge is that some Directors (and possibly members) among the Centre are uncomfortable with marketing generally. Some may feel that the Centre can and should be focused on setting local, long-term priorities for its own research, and not be based on or driven by short-term, external client or market needs (see box, below left). This would be ideal. But, the fact is that external financial support is needed to accomplish any of the Centre's own internal research priorities. Success in securing that support will depend on the extent to which Centre priorities are aligned with those of its funders, clients and/or partners (see box, below right).



In this way, the Centre could be described as an "enterprising not-for-profit". That is, it provides services (research) to clients (sometimes, but not always, more accurately described as funders), in ways that meet the missions of both. This approach reflects a growing trend among a range of funders across British Columbia, in fact, Canada, to whom the mission-based, enterprising mind-set is practical, smart and effective way of achieving well-defined social and environmental outcomes. The Enterprising Non-profit Program, which offers both technical and financial support to such organizations, is one example. It is based in Vancouver, and sponsored by VanCity and Coast Capital credit unions, the United Way, the Vancouver Foundation and others.

Part of the discomfort some Centre Directors or members feel with the notion of marketing may also stem from a belief that it is about "hard selling". Having to overtly "pitch" the

Bulkley Valley Centre to funders or clients for money or other forms of support would not feel comfortable to many within the Centre, and may be equally uncomfortable for its audiences. However, for an enterprising not-for-profit, marketing is as much (if not more) about listening, as it is about talking. Listening and learning about the needs of clients, funders or potential partners is essential, in order to find and recognize common ground. Marketing is about sharing passion for common causes, about helping others deliver *their* mandates and reach *their* goals, when those goals are aligned with those of the Centre. It is about building relationships – not “selling”.

For an enterprising not-for-profit, marketing is as much about listening as it is about talking... It is about building relationships – not "selling".

Because external market support may tend to be short-term and crisis-oriented, whereas Centre researchers will tend to take a longer-term and potentially more wholistic view of research needs, there will always be some tension between the needs of the Centre and the needs or goals of its external supporters. The solution to this tension is twofold. First, the Centre must clearly define the range of projects it wishes to pursue. In other words, the core assets, values and aspirations of the Bulkley Valley Centre must be the starting point – the core brand identity of the Centre. This soul-searching work has already begun through the strategic planning process, which is ongoing. The table on page 5 outlines some of the parameters that have been clarified so far. Second -- and only then --the Centre should match its priorities with the interests and priorities of its funders.

Expanding the network

While the interdisciplinary, diverse teams of experts the Bulkley Valley Centre is able to bring to bear are impressive, they are not yet diverse enough. One challenge is that the Bulkley Valley itself is still losing skilled researchers, project managers and outreach specialists, both as a result of the recent downsizing of regional government agencies, and generally poor economic conditions in northern BC. If the Centre is successful, this trend will be reversed.

Meanwhile, the Centre is lacking in some specific disciplines that would help it deliver the kinds of collaborative teams many clients and funders may need. On its website, the Centre describes itself as conducting research on a range of ecosystems, “including their human dimensions.” But the membership network so far lacks sociologists, anthropologists, and experts in traditional ecological knowledge (TEK), though including them is among the Centre's long-term goals. The Centre also lacks climatologists, a larger number of “media-savvy” extension or outreach specialists, and possibly, skills in project management for larger interdisciplinary projects (there was not agreement at this in the May planning session).

But perhaps the biggest challenge faced by the Centre at this time is the fact that its networks are largely local and regional. In order to grow support and impact, the Centre needs to increase its geographic scope, especially in terms of funding support and potential research partnerships.

Communication tools

Finally, the Bulkley Valley Centre lacks some basic communications tools. The website, for example, should reflect a range of images that help “tell the story” of the Centre’s work to date. Currently, there is a spectacular image of the Bulkley Valley on the home page, a photo of the new ED, and beautiful photos of the Babine on that research page, but few others. Photos of visiting scientists, of elements of the specific ecosystems being studied, of researchers in the field, would all help various audiences connect to the centre more deeply and quickly, and gain a stronger sense of its professionalism and effectiveness. Testimonials are also lacking on the website, but are an excellent way of bolstering the positioning and reputation of any organization, especially when it is not well-known. The Centre does not yet have a track record in terms of public outreach, including extensive publishing and even mainstream media outreach (for example, through opinion letters). Finally, the Centre does not yet have a regular communications link with its members, such as a semi-annual newsletter.

External Challenges

There are several external challenges for the Bulkley Valley Centre.

Funding cuts

Until now, most funding has come from provincial government grants. However, in the next budget, additional budget cuts are predicted across all resource ministries, in order to place greater emphasis on health care and education spending. As a result, it is critical that the Centre find other funding sources.

The Federal government funding landscape is perhaps not so onerous, but remains challenging. All federal funding policies remain uncertain, in the face of a newly-elected minority government, and another election is predicted before the current Liberal term is up. (The October 5th Throne Speech, however, indicates that Kyoto-related funding will remain secure.) In the wake of the recent sponsorship scandal and other budget issues, the federal government has generally become much more cautious about grants, and has imposed more onerous financial and program reporting requirements on all contractors and grantees. This may pose challenges for the administratively-lean Bulkley Valley Centre. Larger institutions, such as universities, may be more appealing to federal funders if they are seen to be more likely to have more robust financial monitoring systems, and possibly liability insurance. The Centre does not have close links to federal funding agencies, so will need to invest more work to build relations with these potential supporters.

On the foundation scene, donations from both US and Canadian sources have been steadily shrinking since the stock market decline of the past three years. Some Canadian foundations, such as the Walter Duncan Gordon Foundation, have a strong interest in Forest Stewardship Council certification and First Nations issues, but most of their funding seems to focus on social aspects of those issues.

Finally, some feel that in the wake of the US-Canada softwood debate and other forest market challenges, there is declining corporate funding for forestry research. However, there

was disagreement about this at the May planning session. One industry representative contends that corporate profits remain high in some sectors, and that funding for scientific research continues.

Potential Competitors

Most Bulkley Valley Centre Directors contend that the Centre seeks to increase overall research funding and generate more work for local researchers and research organizations, rather than compete with them. But the fact remains that in the face of limited potential funding and contract support, there are a number of research agencies or organizations that occupy similar research niches. These are described very briefly in the table below.

POTENTIAL BULKLEY VALLEY CENTRE ‘COMPETITORS’		
Who	Strengths	Challenges
MacGregor Model Forest	Enjoys secure five-year funding from NRC. Also membership-based, including two First Nation members. Credible. Relatively high-profile in sector. Strong support.	Geographically more interior. Narrower focus on forestry only. May have reputation for slow or ineffective delivery.
Round River Canada	“Sexy” niche of conservation biology combined with advocacy appeals to many foundation funders. Great networks & relationships with foundations. Strong communication skills, outstanding images. History & track record. Now have Canadian sister organization working in the BC boreal.	Historically US. Lacks local knowledge and history.
BC Conservation Foundation	Flexible. Strong administration. Strong government relations. Possibly perceived to be more flexible in research standards. Low overhead.	Less clearly-defined quality standards. Perceived to have poor credibility, and to be more of a funding vehicle or “shell”.
Gowgaia Institute	Great networks with foundations. Very attractive, appealing location. Strong local knowledge. First Nation support. Charismatic leader.	Geographically limited to Haida Gwaii.
Canadian Forest Service Natural Resources Canada	Research funds get directed to in-house research staff.	Geographically distant. Operational challenges. No local knowledge.
UNBC, UBC & SFU	High profile. High standards. Low-cost labour (students). Good administrative systems. Can leverage funds – competitive access.	Geographically more limited or distant. Lack of local knowledge. May be slower at delivery. Not as applied. Less experienced researchers (students).

Unclear Positioning

The emerging positioning of the Bulkley Valley Centre in the minds of some of its potential clients is currently unclear, even contradictory, as gleaned from various conversations, interviews and the May planning session. This is related to the fact that some Directors are

former directors of the now-defunct Northwest Institute. But what this means differs greatly for different audiences. Some conservation groups (e.g. ForestEthics and the Babine River Foundation) fear that the Centre may be biased toward what they see as “pro-development” government and industry views, particularly given that most of its grants and contracts are government-based. They also fear that the organization may be another “Northwest Institute re-born” – which apparently translates, from a conservation advocacy perspective, as an organization that produces research papers that are not applied and end up “sitting on shelves”.

Ironically, some potential government or industry clients apparently fear just the opposite: that the Centre will be too oriented toward “conservation advocacy”, as some believe the Northwest Institute was. Will these two views cancel one another out? Probably not. The Bulkley Valley Centre will need to prove itself to both audiences, and be mindful about these concerns. The Centre will need to do sufficient outreach with these clients to promote its credibility, and clarify and make transparent its quality standards. Messages for the public outreach component of each project will also be extremely important for these audiences. As with any high-quality research or policy project, the Centre will need to be vigilant about avoiding conclusions that are not solidly based on the facts, and on ensuring that the scope of each project was reasonable and balanced to begin with.

External Opportunities

Several opportunities also exist for the Bulkley Valley Centre.

Emerging research trends

A growing number of research opportunities appear to be emerging in the resource management sector in which the Centre offers expertise and excellent collaborative teams. Those seen as most promising are listed below:

- Evaluating (vs. monitoring) resource management sustainability. For example:
 - Babine Governance Design Group project evaluation
 - Sustainable Forest Network project evaluation
 - MoF evaluation of projects under the Forest Range Practices Act
 - Canadian Forest Service evaluation for resource sustainability
- Endangered species research, especially around SARA Challenges (WWF), or Recovery Planning, such as through the Federal Interdepartmental Recovery Fund
- Boreal forest Research, with groups such as:
 - Forest Ethics
 - Boreal Trust
 - National Round Table
 - Boreal Alliance
- New corporate forestry systems are just beginning to be implemented by companies such as CanFor, and will need to be evaluated and tested for sustainable resource use

- There are also emerging international research opportunities centred on the formation of global networks and data sharing partnerships, with scientific bodies such as the IUCN, IUFRO (Forest Research Organizations) and the IAVS (International Association of Vegetation Science). Some Directors are involved in several such initiatives that could potentially involve the Centre. It is not clear whether any of these potential collaborations can be leveraged into actual financial support. Further discussion is needed to strategize about such opportunities.

Funding opportunities

Foundation funding may be difficult for the Bulkley Valley Centre to secure directly. Most environmental foundations tend to support research that potentially advances policy change – in other words, they tend to be more oriented toward advocacy research. However, indirect support may be available through such large conservation groups as ForestEthics, the Rainforest Solutions Initiative, World Wildlife Fund and the David Suzuki Foundation. All of these organizations still have significant US philanthropic and in some cases member-based funding, and are still in a position to occasionally commission scientific research. Again, their research needs will tend to be directed toward advocacy.

Specific opportunities exist with NSERC (National Sciences and Engineering Research Council of Canada), which offers funding for post-doctoral students, graduate students, and potentially an industrial chair. The Centre may qualify as an industrial collaborator, so that any funds received can be leveraged significantly. Other federal government funding opportunities may also exist, from climate change files, for example, and need to be explored.

Another opportunity has emerged with the Sustainable Forest Management Network, based out of the University of Alberta. Other similar agencies also present opportunities – these need to be catalogued more systematically by the Centre.

Target Audiences

Some of the key audiences for the Bulkley Valley Centre are already apparent from the preceding text, and are outlined in the text box to the right. At the May planning session, some of these audiences were discussed in detail. That analysis is summarized here.

BC resource ministries and regional initiatives

There are possibly a dozen potential regional agencies and land resource management planning tables (LRMPs) that could potentially serve as key targets for the Centre. For example, the Babine Design Group is working with the Ministry of Sustainable Resource Management to implement a monitoring system. This initiative offers seed funding that has been provisionally provided to the Centre, and may be matched to create a total fund of \$270,000. The Centre may be the delivery agent for the monitoring program if it can demonstrate that it can deliver high-quality, unbiased research. The Centre must work hard to assure such bodies (eg. Morice, North Coast, Kalum South) that it can provide credible – and not inherently “pro-government” – research.

For other government agencies, the Centre will need to demonstrate that it can complete credible research in a timely way with sufficient outreach. Face-to-face interactions (preferably with Directors and staff who were NOT associated with the Northwest Institute) and actual delivery and presentation of current Babine River research projects will be most effective in strengthening the Centre's position with this and other local audiences.

The **Forest Science Program** is the revised program to deliver forest research from the Forest Investment Account (formerly Forest Renewal BC). It currently has a \$9 million program aligned to sustainable forest management, for which it has already accepted some proposals from the Bulkley Valley Centre. The Centre is therefore already known to staff working in this program, and has established a neutral, and possibly positive, reputation with them. There are additional opportunities for effectiveness monitoring research. The Centre has an opportunity to have one of its members sit on a committee that forms priorities for the FSP. It can then learn more about the emerging priorities for the Forest Sciences Program with its current budget. This kind of face-to-face contact will provide the best opportunity for understanding opportunities emerging with this program.

The **Forest & Range Practices Act Evaluation Program** is another program run out of Victoria through the Ministries of Sustainable Resource Management (MSRM) and Water, Air and Land Protection (WALP). The program is still more than one year away from implementation, but has modest resources now available for granting or contracting, in the range of \$300,000 to \$500,000. This initiative is tasked by the Chief Forestry to evaluate the effectiveness of forest

Key Audiences

- Regional land-use planning tables
- BC government initiatives (MoF, WALP, MNSRM)
- Federal government departments (Environment Canada, Fisheries & Oceans, Heritage Canada, NSERC)
- Corporate resource users (CanFor etc.)
- International conservation groups (ForestEthics, WWF, etc)
- Potential new members
- Potential First Nation clients and/or members

practices. The Bulkley Valley Centre is skilled at exactly such research, and can also help with indicator development & testing. In fact, it is already developing such indicators for the Babine River. Face-to-face interactions will be most effective for the Centre in maintaining contact and continued understanding of the mandate of this initiative.

Federal government departments and initiatives

There are several potential federal initiatives through which the Centre may potentially receive funding or contracts. One example is the **Interdepartmental Recovery Fund (IRF)**, coordinated by Fisheries and Oceans Canada, Canadian Heritage and Environment Canada (where the secretariat is housed) to address Canada's obligations under the Species at Risk Act and the international Convention on Biodiversity. A committee of Assistant Deputy Ministers from each department oversees the IRF and approves recommendations for funding, on the recommendations from a more junior Interdepartmental Review Committee. However, all proposals are coordinated through the IRF Secretariat at Environment Canada. Public outreach is a key component of the program. To this extent, the more the Centre can demonstrate strong communication abilities (through its own materials, possibly opinion articles or published scientific journal articles), the more credible it will be. Some Centre members and Directors already have a track record on research focused on marbled murrelets, caribou, tail frogs, and goshawks. In fact, several of the BC experts on marbled murrelets live in the Bulkley Valley. Ensuring that their work is published and shared with representatives from each of the Ministries (on the Interdepartmental Review Committee) will be essential. Face-to-face meetings with local representatives from each department (particularly those with connections to the Interdepartmental Review Committee) will also be essential.

International Conservation Groups

Two examples of the kinds of organizations the Bulkley Valley Centre could potentially target are offered here.

ForestEthics is a large, well-resourced international forest conservation group based out of San Francisco, with a regional office in Smithers. ForestEthics is active in the Great Bear Rainforest and is launching significant international campaigns aimed at protecting the boreal forest. As such, it can potentially offer contracts to the Centre. It also has strong relations with many environmental funders and organizations. However, staff remain sceptical about the independence of the Centre from its predominantly government funders (see "External Challenges - Positioning", above).

In order to have credibility with the media and decision-makers, groups such as ForestEthics need to commission research that will stand up to criticism from opponents. Advocacy or policy-oriented conservation groups also usually require media outreach as part of their communications efforts, which means their researchers must be prepared to conduct media interviews and address critical questions. Probably the best way to understand ForestEthics and seek common mandates is through face-to-face interactions that share the emerging Centre track record on all counts, but

that also focus on ForestEthics' emerging research and advocacy needs. A higher media profile for the Centre (depending on its positioning) may also be helpful.

The World Wildlife Fund is one of the leading conservation groups in the world. Among funders, corporations and governments, it is considered reputable, credible, and practical. It offers the potential of research contracts to the Centre as well as positive positioning and a higher profile. However, few if any WWF staff are aware of the Centre yet. The WWF is currently focused on a marine protected areas campaign on the North Coast (near the Bulkley Valley), endangered species research in the region (though the head of this campaign is located in Toronto), and boreal forest issues. All of these are areas in which the Centre can offer interdisciplinary, applied ecological research. Above all, the WWF will seek credibility through its researchers, in case research results should prove to be controversial. Like ForestEthics, they will probably also require their researchers to be prepared to do media interviews. The most effective way of reaching the WWF will probably be through face-to-face communications. As well, a higher conference profile, past writing and speaking examples, past media writing examples, and testimonials or referrals from others (especially major WWF donors or Board trustees) are likely to be the most effective ways of connecting with the WWF.

Potential members

Finally, new potential members for the Bulkley Valley Centre are a critical audience. Most, but all of these members will be located in the region. In order to reach its goals around geographic expansion, expanded networks of expertise, and more diverse funding, the Centre needs to persuade new members to join, current members to stay, and all members to champion the Centre to other audiences.

There is mixed awareness of the Centre among potential members. Some fear competition from the Centre for limited research consulting dollars. However, the Centre is aimed at generating more work – this will be demonstrated over time. It also offers new members a potentially higher profile, and the potential for collaboration on a range of projects in which individuals may not be able to participate as easily. Influential individuals include local First Nation planning staff and consultants, researchers with similar institutes (e.g. the Columbia Mountains Institute of Applied Ecology); and other locally-based research consultants. Face-to-face meetings and locally-published material (e.g. media articles) will probably be the most important pathways to these local audiences. As well, presentations at gatherings of influential consultants and opinion leaders in the communities (e.g., the Rotary Club) will be excellent opportunities for the Centre to present brief slide shows and tout its success to date.

Key Messages

The messages currently used by the Bulkley Valley Centre (for example, on its website and prospectus) are basically clear, descriptive and straightforward. The challenge for the Centre will be in tailoring its messages to audience needs, emphasising the features that make it unique, and backing those messages up with facts, validators and testimonials from respected and influential past (or current) clients, funders and partners.

In branding and communications, there are often four distinct types of messages, reflecting various levels of audience engagement. All of them can be used at once in the same form of communications outreach. Basically they are:

1. immediate, personal/local benefits (“what’s in it for them?”)
2. investment benefits (e.g., for every \$X raised, the Centre will be able to conduct the following research or develop the following infrastructure)
3. messenger credibility (e.g. the Centre is credible because of its growing track record and outstanding network of experts...)
4. shared vision (e.g. the Bulkley Valley Centre’s “big vision” is....)

The higher the level of engagement of various audiences, the more likely they are to remain loyal and to forgive short-term mistakes.

The Bulkley Valley Centre's "Unique Selling Proposition"

Research dollars are limited, perhaps more so now than they have been in many years. With universities, NGOs and other applied research consultancies providing services that are at least similar, if not at times identical, to the Centre, why should a funder or potential partner choose to support it? In other words, what is the Centre's “Unique Selling Proposition”, or USP? After considering the situation analysis above, and discussing the Centre both in the session, through the survey and with individual board directors, the Centre's USP is described below. This USP summarizes the features that may potentially give the Centre its marketing “edge”.

BVC's "Unique Selling Proposition":

- Credibility – high-quality, independent, peer-reviewed research
- Local proximity to remarkably intact boreal, montane, temperate & coastal ecosystems
- Long-term, in-depth local scientific knowledge
- Broker of excellent research teams,(i.e. convenient “one-stop-shopping”)
- Interdisciplinary & collaborative (the whole exceeds the sum of its parts)
- Applied research for the real world
- Research delivered to the public (i.e. that doesn't “sit on the shelf”)
- Speed, efficiency and professionalism

Tailoring the Centre's Messages

All of the above features are already discussed throughout many of the Centre's materials, but are clarified here based on the session and survey results. Suggestions for tailoring these messages further (in *addition* to the basic points outlined above) for various audiences are outlined below.

Messages to...	Should emphasise
Land-use planning tables	Timely, unbiased and effective research that will withstand criticism and aid in resolving debates or policy issues
BC government agencies	Timely, effective research with some public outreach. The ability to lever funds, to increase the total amount of research conducted.
Federal government agencies	Timely, effective research with some public outreach; effective financial monitoring and reporting throughout project
Conservation groups/foundation funders	Will produce credible research that can withstand criticism, and will assist in media and other public outreach (to share findings)
Potential local members	Will create more work, higher profile, and satisfying opportunities for collaborative practice with like-minded colleagues; building local capacity
Corporate funders/partners	Timely, effective research that will help managers achieve on-the-ground objectives more effectively and efficiently; aimed at practical application

Bundling Interdisciplinary Services

The “one-stop shopping approach” possible with the Bulkley Valley Centre needs to be validated more clearly in current messages. This can be achieved by bundling research and funding proposals ahead of time into distinct, prioritised categories of work and teams, based on the anticipated needs of various clients.

Marketing Strategies

Based on the planning session and follow-up analyses, major recommended communications strategies for the Centre can be summarized as follows:

1. Materials to support face-to-face outreach
2. Increase exposure at key conferences
3. Increase exposure through key media & scientific publications
4. Strategic member recruitment
5. Other strategies

Support face-to-face communications with collateral materials and images

Analysis of the Centre's target audiences shows that **relationship-based marketing** approaches will be of greatest benefit. This will require extensive face-to-face communications, not only by the Executive Director, but by all members and Board volunteers, as well as other allies.

Specific materials recommended are:

- Develop a **revised brochure** with more images that clearly emphasise the Centre's unique features
- Highlight the growing track record: **list all projects** completed and in process on the website and possibly a brochure insert
- Make it easy for messengers to talk about the Bulkley Valley Centre: develop a simple **PowerPoint** presentation template, with a look and feel (colours, fonts and layout) similar to the website
- Create a simple **display booth** or table. (Note - one possible supplier of full-height or table-top displays stands, Plexiglas brochure holders and other related items is www.theportables.com. For mounting text and images on foam core, local printers can help.)
- Develop a simple **template for posters** & display cards for completed and in-process projects (e.g. for conference table displays)
- Produce a simple **e-card template** (HTML-formatted) for invitations to conferences, workshops, and other events (the Centre's web designer can probably produce this).
- Develop an **e-newsletter template** (HTML-formatted) for news, continual brief reminders about the Centre's work and success, and to aid with public outreach. This need not be onerous or costly; many software packages simplify the job and start at \$30 per month per 5000 recipients. Worth exploring are:

- Got Marketing (<http://www.gotmarketing.com>), (used by Sierra Club BC, and soon to be used by IMPACS)
- What Counts (<http://www.whatcounts.com>)
- Canadian firm MyMailout (<http://www.mymailout.com>)

Note: As a BC-based charity focused on the environment, the Centre may qualify for software discounts and support from One/Northwest BC (Contact jodie@onenw.org for more info).

- **Gather and catalogue more images:** The Centre has potential access to some beautiful images, many taken by its Directors and members - but most do not seem to be readily accessible. To enable Centre presenters to quickly update their presentation materials, to keep the website fresh and to help “tell the Bulkley Valley Centre story”, staff and members should make it a habit to always consider digital image gathering in every research project. Site visits should be documented and posted wherever possible, as well. To facilitate the use of these images, it would be helpful to develop an internal image bank, with full credit and permission of course, for use in all materials. Make sure the photos themselves highlight the special features of the Centre (eg. show specific images of endangered species, demonstrations of GIS mapping, lush images of all three major ecosystems, action images of collaborative teams at work, outdoor education with young people, etc.) Two examples of inexpensive open source image gallery packages include:
 - “Gallery” (<http://gallery.menalto.com>)
 - “Coppermine Photo Gallery” (<http://coppermine.sourceforge.net/>)
- **Gather and post “testimonials”:** Testimonials from respected and well-known clients, funders or partners of the Centre will immensely improve its credibility and positioning. Ideally, these should be posted on the website and used regularly on all materials, including funding proposals where appropriate. Should the Centre develop a client evaluation tool, clients can be invited to offer comments for public quotation systematically.

Increase exposure at key conferences

The Bulkley Valley Centre’s profile and positioning will both be enormously strengthened by increased exposure to its target audiences, and potential “messengers” to those audiences, at conferences and workshops related to natural resource issues. Some of the other strategies described here (developing conference display materials, publishing more peer-reviewed articles, gaining some media exposure, and using relationship-based marketing approaches) will all assist the Centre in getting invited to attend, host displays, or better yet, offer presentations, at various local, national and international conferences. For convenience and consistency, the Centre should provide promotional materials to Directors and researchers, so that even those who are attending conferences for other purposes can more easily “spread the word”. Initially (e.g., through 2004-2005), Directors are likely to be the strongest “messengers”, as they are most familiar with the Centre’s work and mandate.

Increase exposure through key media

Because so many potential clients require public profile for their work, and because of the Bulkley Valley Centre's own mandate to do public outreach, researchers should always be prepared to speak to the media about their research findings. This is particularly true (and will be easier to achieve) for more controversial resource management issues. The Centre may also choose to publish opinion editorial articles (typically 600 words) or letters to the editor for some issues, where appropriate, to become positioned as a "pundit" on the scientific aspects of resource management issues. A short article on how to prepare these has been attached separately. Spokespeople can prepare themselves by reviewing the basic message criteria outlined in this document, as well as by anticipating potential questions they may be asked by the media, sometimes questions that have been suggested by critics. Whenever the Centre is successful in achieving positively-framed media coverage, it should be sure to:

- Publish those stories, or links to those stories, on its website and its e-newsletter
- Send copies to funders, other clients directly

For a preliminary media list (select BC and some national contacts), see the Media List, attached separately. For a handout on preparing spokespeople to speak to the media, see Appendix 2.

Increase exposure through key scientific publications & trade journals

This is a clear objective of the Bulkley Valley Centre, but it is also a strategy. The outreach component of Centre's work is critical to its mission, and to the mandates of all of its key audiences (or "target markets"). As well, the Centre's highly specialized audiences generally read scientific journals associated with their areas of expertise. Peer-reviewed publishing exposes the Centre to more of its specific audiences, raising its profile and strengthening its positioning as an effective, credible, high-quality research consultancy. Each lead researcher will choose the most appropriate journal based on the research topic. A preliminary list of scientific journals has been sent separately.

Increase credibility & reach through strategic membership recruitment

The Bulkley Valley Centre needs to increase its reach and its ability to deliver appropriate interdisciplinary research teams. Expanding its membership, starting with the planned membership drive in Fall 2004, will help achieve both these objectives. New members can serve as ambassadors and help the Centre deliver its mandate, as well as provide some modest additional funding toward core costs. In recruiting new members, there are some key considerations:

- **Prioritise members that will strengthen positioning.** For example, target new members who are credible with both ForestEthics – the nearest and possibly most likely influencer of other ENGO and conservation funder-supported work – and with potentially sceptical industry clients. Avoid members who are controversial with either group. Consider approaching a respected, high-profile, non-controversial conservation organization such as the Federation of BC Naturalists or the Nature Conservancy to join.

- Related to this, **list current members on the website**. Be transparent about who influences policy directions (i.e. supporting members) and who is a member at large. Consider listing members by category (e.g., the MacGregor Model Forest does this).

Other Communication Strategies

Strengthen credibility through quality standards & screens:

Credibility is the single most significant consideration for the majority of the Bulkley Valley Centre's potential clients, as identified in the group's own market analysis. The major issue appears to be credibility around issues of bias. As noted earlier, some potential clients are concerned that Centre may be *too* biased toward the advocacy views of industry and government, either explicitly (due to its larger industry market), or implicitly (due to simple political naiveté). Others are concerned that it will be too biased toward conservationists. Another possible vulnerability is the fact that it is membership-based, and thus could be perceived to be subject to receiving research direction from members with strong pro or anti-industry biases.

As well, consider inviting various stakeholders – even if they are not supporting members - to help shape research parameters, and publicize this. For example, for a potentially controversial central coast forest research project, the Centre could invite ForestEthics, along with corporate representatives, to provide feedback on the initial research parameters at the outset of the project. Such transparency may not be suitable for some contracts or projects, but is worth discussing.

Increase credibility to potential First Nation Clients

As part of its effort to diversify its member base, the Centre has discussed recruiting First Nation members. TEK is a sought-after element of its skills-roster, and some First Nation experts may be able to assist with screens and protocols for this research approach. However, it is not yet clear what the Centre may offer such First Nation experts. From a communications perspective, it would be helpful to be able to list First Nation board members, members at large, or even advisors, in promotional materials. However, those relationships themselves will take time and the development of careful protocols to develop.

Appendix 1: Preliminary list of potential web links

Professional Associations

Association of British Columbia Professional Foresters. <http://www.rpf-bc.org>
Association of Professional Biologists of British Columbia. <http://www.apbbc.bc.ca>
Canadian Society of Zoologists. <http://www.csz-scz.ca/jpellerin/csz/cszanglais>
International Association for Bear Research and Management. <http://www.bearbiology.com>
Society for Conservation Biology. <http://conbio.net>

Research Organizations & Institutions

Canadian Climate Impacts and Adaptation Research Network – BC. <http://c-ciarn-bc.ires.ubc.ca>
Centre for Applied Conservation Research <http://www.forestry.ubc.ca/conservation>
Columbia Mountains Institute for Applied Ecology. <http://www.cmiae.org>
Forest Research and Extension Partnership. <http://www.forrex.org>
MacGregor Model Forest
Pacific Northwest Research Station. <http://www.fs.fed.us/pnw>
University of Northern BC (UNBC) <http://web.unbc.ca>

Government Agencies

BC Government Climate Change. <http://wlapwww.gov.bc.ca/air/climate>
BC Ministry of Forests. <http://www.gov.bc.ca/for>
BC Ministry of Forests Regional Offices. <http://www.for.gov.bc.ca/mof/regdis.htm>
BC Ministry of Water, Land and Air Protection. <http://www.gov.bc.ca/wlap>
BC Ministry of Sustainable Resource Management. <http://www.gov.bc.ca/srm>
Canadian Centre for Climate Modeling and Analysis. http://www.cccma.bc.ec.gc.ca/eng_index.html.
Canada Centre for Remote Sensing – Climate Change.
http://www.ccrs.nrcan.gc.ca/ccrs/misc/issues/cchange_e.html
Canadian Forest Service/ Pacific Forestry Centre. http://www.pfc.cfs.nrcan.gc.ca/index_e.html
Canadian Wildlife Service. http://www.cws-scf.ec.gc.ca/cwshom_e.html
Intergovernmental Panel on Climate Change. <http://www.ipcc.ch>
Parks Canada. http://www.parkscanada.gc.ca/index_e.asp

Conservation Organizations

Ducks Unlimited Canada (<http://www.ducks.ca>)
ForestEthics www.forestethics.org
Nature Conservancy of Canada. <http://www.natureconservancy.ca>
Round River Conservation Studies (www.roundriver.org)
World Wildlife Fund (<http://www.wwf.ca>)

Appendix 2: 10 Tips for Successful Media Interviews

1. Know, and fully understand, why you want to talk to a reporter

- The media is just a vehicle. Who are you *really* trying to reach (key audiences)?
- How will coverage advance your objectives?

2. Be Available!

- Never send out a communication to the press if your key spokesperson is not readily available and prepared to comment
- Have your spokesperson's entire, detailed schedule and contact information (home, cell, office etc) for the next two days at hand, in case reporters or talk show producers want to set up interviews

3. When the reporter calls you...

- Gather 'intel' – ask about deadline, timing, story angle, story format, others s/he is contacting
- Don't feel you must take the call immediately – gather your thoughts, call back within 10 minutes

4. Know your subject intimately—forwards, backwards, upside down

- Gather timely and extensive data related to your issue, and have a few salient facts and statistics and interesting examples that illustrate the issue at your fingertips.
- Anticipate what opponents might say, and address their points—be proactive, not reactive

5. Prepare your top 1-3 Messages

- Make them clear, concise, compelling, brief, and jargon-free
- Be prepared to “bridge” back to these messages several times throughout the interview; provide necessary responses to questions asked, but lead back to your own messages as quickly and skillfully as possible
- Be proactive in inserting your messages throughout the interview – your responsibility is to the messages of your issue and organization, not to the reporter

6. Know what you want to say in one minute or less

- If you can't summarize your news in one minute, it's too complicated or it lacks focus
- Talk in sound bytes, keep answers short, do not over-answer
- Avoid acronyms, jargon and technical terms—remember who your audience is
- Use your organization's name; avoid “we” or “I”

7. Prepare your internal “Q&A” to both basic and tough questions

- “so, what's the story?” (the opening soft-ball question – your chance for a home run!)
- “give me the evidence!” (give 1 or 2 examples, too)
- “how much is this going to cost?” (this is very popular question!)
- “the other side of the story : how do you respond to opponents who say...”

- “why should I care?”
- “why now?”
- “what’s your solution?”
- “what’s next?”
- Think of nasty questions you hope you won’t be asked -- and prepare answers for them, too
- DON’T say “no comment” – or the reporter will smell blood!

8. If you don’t know an answer, never lie or make it up

- Tell the reporter you’ll get right back to them with the information they want, and do!
- Or, give the reporter a contact who does know the answer. S/he will remember you as a cooperative and reliable source.

9. Make positive statements (ie, don’t repeat the negative)

- Avoid defensive comments (eg., instead of saying “I’m NOT guilty”, re-frame as “I’m INNOCENT”!)
- Watch for loaded or “bait” questions; disagree respectfully, reframe the issue and bridge back to your main message

10. An interview is a performance

- Project energy and confidence. Be truly interested in your subject; engagement is contagious.
- Speak clearly and don’t rush. Emphasise key points.
- Stay calm. Don’t over-emote, especially with TV; let the audience react.
- Speak with energy. Sit up. Speak as if you are not intrigued by the subject, you won’t get the reporter interested either
- Imagine one listener and relate to him/her
- Practice, practice, practice!