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1. About this plan

This is the communications plan for the KT-EQUAL consortium. It describes the consortium's intended communications activities for the period 1 January 2010 to 31 December 2012.

The activities covered by this plan include all communications aimed at external audiences. This plan does not cover internal communications between consortium members, nor does it cover purely academic communications (that is, communications between academics working in the same field, or communications which use exclusively academic channels such as journals), except where there is overlap between these and communications aimed at wider audiences.

2. Overall objectives and activities

KT-EQUAL's communications activities will support the organisation's overall objectives. These are defined in the consortium's Case for Support document as follows:

to take forward and further develop and extend the work of EQUAL and SPARC, thereby enhancing the quality of life and wellbeing of older and disabled people. Specific objectives will support a UK-wide knowledge creation and exchange process [...] to:

- Work with stakeholders to identify knowledge needs
- Encourage and enable world-class knowledge creation, analysis and storage
- Facilitate the exchange of knowledge between creators and users
- Advocate the use of knowledge as a driver for change

For practical purposes, activities designed to meet these objectives have been grouped into four 'work packages', with different members of the consortium responsible for each work package. The work packages are:

- 0 consortium coordination and management
- 1 ensuring the continuity of research
- 2 'think-tank' and communities of interest
- 3 exploiting knowledge transfer through the existing consortia

3. Core communications activities

In work package 0, four deliverables identified in the Case for Support are directly related to communications activities, namely:

- **branding:** "a distinct and recognisable brand"
- **website:** "an accessible, interactive and constantly updated website"
- **publications and resources:** "hard and soft copy marketing materials"
- **media relations:** "mentions of EQUAL research in the media"; "knowledge and citation of the consortium through citation in the professional and popular press"

These four deliverables will be the focus for KT-EQUAL's core communications activities. The remainder of this section spells out in more detail how they will be achieved.

Branding

The consortium will develop a distinct brand which can be applied across all its activities. There are three elements to this:

- a distinctive visual identity
- an appropriate communicative style
- effective agreement about when and how these elements are applied

The visual identity is the easy part. The consortium already has a graphic device (shown right) which can serve as both logo and logotype. Distinctive elements of this device, including its colour, font and style, will be used to create a set of visual identity guidelines for printed and electronic materials.



The consortium's communicative style is another important part of its brand identity. Its choice of words, its tone, and the way it uses images and graphical design elements must all be appropriate to the target audience and convey both professionalism and consistency. For external publications – including documents aimed at academics working in areas that are not central to KT-EQUAL research – this means that the consortium's style must be:

- clear and direct
- free of jargon
- appropriate to the level of background knowledge of the audience, but never patronising
- neither stuffy nor overly informal

The third element of branding, namely deciding when and how guidelines are applied, will be more of a challenge. By its nature, KT-EQUAL is not a single centralised entity which can plausibly dictate and enforce inflexible branding rules across the board. Rather, its activities are conducted by a wide range of different people and organisations, most of whom are employed by individual research groups, consortia or universities. This is an organisational strength but a communications problem. The three groups that make up KT-EQUAL – SMART, I'DGO and i~design – each have their own existing brand identities, as do the universities to which these groups are affiliated and the other organisations with which they work.

However, while KT-EQUAL is by its nature a complex partnership with multiple stakeholders, it must appear to the onlooker to be a single, coherent entity, albeit one with members from many different institutions and in many different geographical locations. It is essential that internal organisational complexities are suppressed as much as possible in external communications, so that messages can be conveyed clearly and audiences are not distracted by unnecessary references to the consortium's internal structure or by wide variations in presentation styles from document to document.

The solution which the consortium will adopt is an 'umbrella' approach to branding. For 'core' communications which are not aligned to any particular group, institution or individual, such as general consortium publications and press releases, the KT-EQUAL branding will be used alone and without any parallel branding from other organisations. In this situation, the KT-EQUAL logotype will be taken to stand for all the member organisations under the 'umbrella', without need to mention them all by name.

However, for 'partnership' communications where one or more groups, institutions or individuals are prominent, such as events organised under KT-EQUAL auspices, the groups, institutions and individuals which make up KT-EQUAL's membership will continue to use their own branding guidelines, but the communications will also bear a common graphical element including the KT-EQUAL logotype. This single graphical element, which may take the form of a distinctive header or footer added to the publication, will serve as a unifying device. It will also express to external audiences a simplified version of the relationship between the consortium and its members, partners and stakeholders, perhaps with the use of a phrase such as 'hosted by KT-EQUAL', 'in association with KT-EQUAL' or 'a member of the KT-EQUAL consortium'.

The precise appearance of the consortium's branding elements will be spelled out in the visual identity and style guide.

Key early objective for the Communications Officer

Design, develop and codify a distinctive visual identity and accompanying style guide for KT-EQUAL external communications.

Website

The consortium will develop a website as one of its most important communications channels. The site's intended features are described in the Case for Support:

The KT-EQUAL website will be a key branded resource for the consortium and the communities that it supports. It will be interactive, providing a range of features that are likely to include regular e-bulletins of progress, case-studies of successful knowledge transfer and services such as blog support, active information feeds, streamed image content, wikis, smartlinks and user-generated web-video content. All the KT networks will operate from this site. It will subsume the existing EQUAL website and, as far as possible, the SPARC website. It will also function as a portal for the three EQUAL consortia (i~design, I'DGO TOO, SMART). It will contain the proceedings of events and other activities, which eventually will become a key part of the memory bank of the consortium activities. Also, following on from SPARC, it will be used to build a member database, advertise training, workshops, and knowledge transfer opportunities, and provide access to key partners in different sectors. The leaders of work package 0 and work package 1 will work together from the outset to ensure that the consortium website includes timely information on current relevant funding opportunities, case studies of successful research and knowledge transfer activity to keep the research community informed.

To this ambitious list of features we must also add:

- **accessibility:** given the nature of the consortium's external audiences and the subject matter of its research, the site must achieve the highest possible levels of accessibility and useability by all user groups
- **visibility:** in order to attract more visitors, especially among user groups who are not closely linked to KT-EQUAL, the site must be easy to find both through search engines such as Google and through links from other relevant sites
- **content management:** with so much content, it must be possible for multiple consortium members each to take responsibility for adding and editing content related to their own jobs and interests
- **readiness:** as a key communications tool, the site must be in place to support all the consortium's other activities as soon as possible, preferably from early 2010

This is no small undertaking. To design, build, test and roll out such a site from scratch in the conventional way would involve more time than the consortium has and more money than it can afford.

To get round this problem, the consortium will adopt a phased roll-out of the website. A first version of the site will be developed and launched as soon as possible, ideally in early 2010

to coincide with any broader KT-EQUAL launch event. As a minimum, this initial version will feature:

- clear, attractive KT-EQUAL branding
- general information about the consortium
- a system which allows users to find out about forthcoming events and register for them
- a news feed so that information can be kept fresh
- a system by which interested readers can join the consortium's mailing list
- a searchable content archive to which SPARC and KT-EQUAL publications can be progressively added

Importantly, this first version of the site will appear complete to the user, with no overt suggestion that it is still under development.

More advanced functionality will then be developed in phases over the following year. The order of priority for this functionality will be agreed as the site develops, based on the list given in the Case for Support as well as on user feedback and the evolving demands of the organisation. The target will be to have a complete, feature-rich site in place by the end of 2010.

Once the website has been launched, it must be effectively marketed. This will be achieved by:

- including the web address prominently on all KT-EQUAL-branded publications
- optimising the site's content for indexing by search engines
- establishing links with related sites
- where appropriate, encouraging members of the consortium to maintain an active presence on other relevant sites and online forums
- keeping the site's content fresh and up-to-date with news and events

Key early objective for the Communications Officer

Identify relevant technical expertise within or outside the consortium to develop the website as a matter of urgency. Provide design guidelines and functional specifications to enable an initial build to be developed very quickly.

Publications and resources

The consortium will develop publications and resources which will allow it to communicate with a wide range of audiences. The nature and content of these will be driven by the activities of the consortium across all work packages. Initial publications and resources will include:

- a general flyer or brochure
- a letterhead template
- a written document/report template
- a Powerpoint template
- conference and presentation materials, such as display panels
- regular e-bulletins to the KT-EQUAL mailing list

In the longer term, publications and resources will be created to respond to the developing activities of the consortium, as described in section 4 of this plan.

All publications will be created in electronic format and made available to download from the website. Paper versions will be created where appropriate. They will conform to the highest standards of accessibility in both formats. They will be consistently branded.

To support publications, an online image library will be created where images owned by the consortium and related to its activities can be stored and catalogued.

Key early objective for the Communications Officer

Produce an initial set of general publications and resources for use across the consortium, and create an online image library to support future communications.

Media relations

[Note by Toby: I'd like to talk to Trevor and think about this a bit more before I write this section. Hopefully a conversation with him will help to iron out what exactly our priorities are when it comes to the media.]

4. Other activities

In addition to the core communications activities described above, most of which flow from work package 0, resources will be available in a supporting role for other activities across all work packages. As these activities develop, it is anticipated that communications requirements may include:

- providing a general copyediting and advisory service for text aimed at external audiences which is drafted elsewhere in the consortium
- editing and branding ad-hoc publications created as part of the consortium's work
- supplying standardised 'boilerplate' text about the consortium to other stakeholders, to ensure consistency of message whenever KT-EQUAL is mentioned
- working to produce ad-hoc materials, especially for major events such as any planned launch event
- working in conjunction with the consortium lobbyist in any political communications

5. The transition from SPARC to KT-EQUAL

KT-EQUAL has replaced SPARC, and the consortium therefore inherits the considerable output of its predecessor as well as a large network of stakeholders and interested parties towards whom future outputs can be directed. It is crucial to take advantage of these valuable resources, but from a communications point of view, the transition from the SPARC brand to the KT-EQUAL brand needs to be managed carefully.

To continue the SPARC brand in parallel to KT-EQUAL, or to attempt a gradual transition from one to the other, would be to invite confusion. Therefore, the consortium will instead make a

clean break from one brand to the other. There are several reasons for preferring such an approach:

- **for clarity and simplicity:** external audiences should not be confused by references to pre-existing organisations which overlap substantially with the present organisation
- **for effectiveness:** multiple brands will compete for audiences' attention, especially on the web; this is obviously undesirable
- **for media relations:** the launch of a new organisation is likely to generate more favourable coverage than the continuation and evolution of an old one

To put this into practice:

- the entire useful content of the SPARC website will be transferred to an archive on the new KT-EQUAL website before it is launched
- the SPARC website will be discontinued, and all visitors will be redirected to the equivalent page on the new KT-EQUAL site with an explanatory message
- there will be zero-tolerance of SPARC references in publications and resources, except in archived materials; if older publications and resources are reissued or continue to be widely used, they will be rebranded KT-EQUAL with an explanatory note clarifying their origin
- links and references to SPARC elsewhere, for instance in external documents and on the web, will be pursued and changed wherever possible

To further reduce the potential for confusion, for a short time after the changeover has taken place the KT-EQUAL site will bear an explanatory note or line of text which will be agreed by the consortium ('Starburst: the new name for Opal Fruits?').

6. Decision-making and responsibility

Strategic direction for KT-EQUAL, including strategic and policy aspects of communications activities, will be provided by the consortium's Principal Investigators under the leadership of its Principal Director, taking advice from the Communications Officer and other staff as it deems appropriate.

Responsibility for the implementation of this plan will lie with the Communications Officer, who is responsible to the Principal Director.

The content and design of 'core' KT-EQUAL communications activities will be originated or commissioned by the Communications Officer and sign-off approval will be given by [...whom? Trevor? Gail? A little working group of Trevor, Gail and me?]

In order to maintain a consistent style and standard of communications, any communications activities which bear the KT-EQUAL brand and have been produced by other members of the consortium will be directed through the Communications Officer, who will provide advice and editorial guidance as described in section 4 of this plan.

Content on the website will be managed by those consortium members who originate that content. For instance, event listings will be added by the Research Coordinator or by the organisers of each event; news items will be added by those who are best placed to communicate them; and so on. The Communications Officer will maintain editorial oversight of information added in this way.

Applications for use of the consortium's brand (including its logotype) by external organisations will be directed to the Communications Officer.

7. Resources

[Note by Toby: I realise the main resource is me, but it would be useful to pin down what other resources are available from elsewhere in the consortium. In particular, we need to know what technical expertise will be available to develop the website, and exactly what Trevor can offer in terms of media work - something else for me to talk to him about!]

8. Monitoring and evaluation

[Note by Toby: What are the KT-EQUAL reporting requirements? What evaluation data do we need to gather for comms activities? How important is media monitoring? What analytics tools will be available to record website usage?]