EBC

Energy in Buildings and Communities Programme

Masterclass Workbook – Module Checklist and Activity Sheets

The goal of the masterclass is to help Operating Agents and their teams to engage with the key audiences for their research so you can increase its impact.

This includes learning how to identify the target audience from the wider group of stakeholders in the topic or research field. To achieve this, the masterclass includes practical activities such as audience analysis and stakeholder mapping. These activities will guide the Operating Agents into creating a plan for effective communication.

With the insights from these activities, Operating Agents will be able to develop a communication strategy that is tailored to the Annex's target audience, from decision makers in their policy field, to mainstream media and social media experts. This involves decisions about the key findings to highlight from the research, the language to use, the structure of the research message, and the best media and communication channels to reach the key audience.

Module Checklist

The masterclass includes a Module Checklist to help the Operating Agent and Annex members to track their progress through the masterclass. There are also individual sheets that run through each activity as an aid if the activity is run as a workshop.

Templates and Tools for Policy Briefs

To support your communication efforts, this masterclass provides a standard template for writing policy briefs and executive summaries. These templates come with a detailed guide on how to use them, along with a supporting document that contains communication insights and useful resources. Module One shows how these can be used while Module Two has a step-by-step process on how to complete the templates.

Outcome of the Masterclass

By the end of this masterclass, you will have developed a clear strategy for engaging your target audience and increasing the impact of your research.

MODULE 1 CHECKLIST - AUDIENCE AND STRATEGY

Module 1 aims to provide the tools to understand the key target audiences for research projects. This includes how to identify audiences and the ecosystem of stakeholders they operate in. Once identified, we will show you how to analyse the field you wish to influence `through stakeholder mapping and audience analysis. The module also demonstrates how these activities will influence the policy brief and executive templates. The outcome is to enable Operating Agents and their teams to develop a strategy for the audience they are aiming to influence.

Tick off the elements you have completed

- ☐ **The basics**: why you need to identify and understand your audience
- ☐ Understanding your audience in a policy context
- ☐ Your audience in its stakeholder ecosystem
- ☐ **Laying the foundations:** gathering audience and stakeholder information
- ☐ Stakeholder mapping
    - ☐ ACTIVITY 1: data collection and grouping – understanding stakeholder ecosystem
    - ☐ ACTIVITY 2: data mapping – 2 approaches – identifying audience
- ☐ Panel approach – deep dive into your audience
- ☐ **Getting ready to write:** Language choice based on audience choice
- ☐ Decision maker, gatekeeper and policymaker audience analysis
    - ☐ ACTIVITY 3: questions to focus on your audiences
- ☐ **The tool:** How this informs your policy brief or executive summary

Reflection - what is one thing you have learned that will be useful for your future research impact?

ACTIVITY 1 – DEFINING YOUR AUDIENCE

The purpose of this activity is to ensure you have thought of everyone that could be interested in the research and its outcomes.

- ☐ **ACTIVITY 1 – defining your audience**
  - ☐ **Step 1.1. Brainstorm and identify who your stakeholders are.**
  - ☐ **Step 1.2. Grouping**

Method:

You start by brainstorming who the stakeholders are. The stakeholders are the broader set of people interested in or who will be affected by the research, or whom you wish to directly influence.

This is a great activity to do with your Annex team, both at the point of creating the project and revisiting it when the key outcomes of the project have been determined.

Once you have identified the stakeholders, you group them depending on criteria that are relevant to your research – for example if it is health related, building related or education related. Or you can group them depending on the sectors of society they belong to – for example Public Sector (Government); Private sector (Business and Industry); and Civil Society (Community groups).

Outputs:

From this work you will end up with a list of stakeholders and these stakeholders will be grouped.

Option of how to document output:

Annex project title: ………………………………

Key recommendations you want taken up:

……………

……………

……………

Key stakeholder groups that could be interested or affected

Stakeholder group	Stakeholder group members
e.g. Public Sector	- Political decision-makers - Driving group – the policymaker or the responsible person advocating for the change - Entities in partnership with the government (e.g. international bodies and financial institutions)

ACTIVITY 2 – STAKEHOLDER MAPPING

The purpose of this activity is to map your stakeholders to be able to identify the audience you will specifically be targeting with your communication. There are two ways to map – you can map based on priority, or relationship.

Mapping by priority is quick and simple as an activity which might be good to do at the start of your Annex development. Mapping based on relationship can be a finer scaled and strategic approach as you think who your target audience and their stakeholders listen to. This includes people with whom you or your team have trusted working relationships. ~~is~~

- ☐ **ACTIVITY 2 – data mapping – 2 approaches**
  - ☐ **Priority – quick simple less complex group of stakeholders**

  OR
  - ☐ **Relationship – more complex and messy groups of stakeholders**

Method 1: PRIORITY MAPPING

The aim of this is to understand who your priority is, and from your stakeholders who is the audience you are speaking to directly.

Preparation: Have a note taker document the discussion as you do the drawing. As you do the steps below discuss: why they are a priority? What do you want them to do with your research? And what would they want to know from your research?

Taking the output of Activity 1 – your list and groups of stakeholders

Step 1 - Draw three concentric circles

Step 2 - Identify the highest priority stakeholders in the middle circle and work your way out

Step 3 – Your priority audience is the group that will benefit the most from understanding your research – the group that's worth your greatest effort to reach.

Step 4 - Include the specific names of key stakeholders as well as the type, especially if they are influential. For example, World Green Building Council (WGBC) is an important NGO.

Step 5 – revisit with everyone:

- why they are a priority?
- what do you want them to do with your research?
- what would they want to know from your research?

Output:

The drawing that maps where organisations sit and an understanding of their relative priority regarding them being interested in your work.

Option of how to document output:

Annex project title: ………………………………

My priority stakeholder or my audience will be: ………………………………

Other stakeholders that can have an interest and influence are: ………………………………

Priority	Examples	Why are they placed where they are	What they want to know	What you want them to do
Centre – critical				
Inner circle – influential				
Middle circle – aligned and interested				
Outer circle – related				

Method 2: RELATIONSHIP MAPPING

The aim of this is to identify which stakeholders will impact your target audience and how they can impact each other. This helps with choice of language, examples, recommendation formulation, etc.

Preparation: Have a note taker document the discussion as you do the drawing. As you do the steps below discuss: why they are a priority? what they would want to know from your research? And what do you want them to do or act on with your research?

Step 1 – Using your stakeholder list and/or priority map, choose your target audience.

Step 2 – Write the target audience in a circle in the centre of a white board or large piece of paper.

Step 3 – Add other stakeholders, starting with those they have direct and important relationships with.

Step 4 – Draw lines between the target audience and stakeholders to indicate relationships. Also Indicate relationships between stakeholders.

Options: Use position to indicate hierarchy. Use different line styles to indicate types of relationship.

Output:

The relationship map will be something that highlights connections and potential areas of resistance, influence and opportunity.

Option of how to document output:

Annex project title: ………………………………

My audience is: ………………………………

The stakeholders that have the biggest influence on my audience are:
………………………………

Therefore, the outcomes and recommendation for the research should include case studies, ways to engage, ways to acknowledge these stakeholders, etc. Key thoughts are:

………………………………

………………………………

ACTIVITY 3 – FOCUSING ON YOUR AUDIENCE

From Activities 1 and 2 you have created a stakeholder list, grouped them, and then identified who your key audience is. If you have done the relationship mapping, you will also have a sense of the stakeholders that influence the audience. With this information you can now choose the language and the way to present your research findings for maximum impact.

To help with this, Activity 3 outlines four questions you can ask to further develop the table from Activity 2:

Method:

Aim – to understand the information needs of your target audience

Preparation: Have a note taker document the discussion or a scribe at the table so that everyone else can focus on the discussion.

Step 1 – Ask **who** are your target audience – you may have mentioned a general department but who in that department can you identify? Do you have a name, a title, and idea of the specific person who will use the outcomes of your research? What is this person's role?

Step 2 – ask – what **do** you want that specific person to do or act on with your information, the executive summary or the policy brief?

Step 3 – ask – if you know what you want them to do with your research, what do they need to **know** to be able to do it? What is important to them, this can help focus your choice of output – policy brief or executive summary

Step 4 – as you prepare for this audience ask: "what do they **already know?"** This will mean you can either focus your communications if they understand your field well, or if they are more general then you can explain things more simply.

Output:

The audience we are focusing on is____________________________

With the outcomes of the research, we aim for them to do _________________________

To get them to do that they need to know ____________________________

The level of knowledge of my field of research is _________________________ therefore when we outline what they need to know we need to ____________________________

MODULE 2 CHECKLIST – USING THE GUIDES AND TEMPLATES

The aim of Module 2 is to guide you through a set of templates, guides, and sample documents designed to enhance how your Annex connects with its key audience. By using these resources, the Operating Agent can guide their team to produce policy briefs and executive summaries that are more engaging, accessible, and impactful. The module goes through the tools that have been developed to support clear, targeted communication, helping the Operating Agent to effectively convey research insights to decision-makers and other stakeholders.

By the end of this session, you will have a solid understanding of the available tools and resources that can help improve the reach and influence of the research. Over the course of the module, we will see three sample documents that demonstrate how the templates can be applied, giving you a concrete example of how to use these tools to create polished and compelling materials. This will equip you with practical strategies to enhance the clarity and effectiveness of the Annex outputs.

Tick off the elements you have completed

- ☐ Aims and outcomes
- ☐ Guides, templates and sample documents outline
- ☐ Communication insights and useful resources
- ☐ Content of Policy Brief or Executive Summary
- ☐ Template Outline for Operating Agents + Example from Annex 72
- ☐ Demonstration Annex 80: Resilient Cooling of Buildings
- ☐ Tips and Tricks for Visuals

MODULE 3 CHECKLIST – GOVERNMENT AND INDUSTRY

The aim of Module 3 is to encourage your Annex to consider the specific information needs of both policymakers and industry leaders. By understanding what each audience values, the Operating Agent can tailor the research findings to better serve audience needs, ensuring that the outcomes are informative, actionable and relevant.

Module 3 offers a brief overview of the information needs of policymakers and the context in which they make decisions on research projects, such as those from Operating Agents. This includes understanding the key information requirements and preferred formats that support these decisions. The module also examines similar needs in industry, making distinctions between the needs of profit-driven, non-profit, and peak body organisations.

The purpose of this module is to clarify what these stakeholders expect from the outcomes of Annex work. It also provides an opportunity to consider how the type of organisation affects the information developed for each sector.

Tick off the elements you have completed

- ☐ Aims and outcomes.
- ☐ Main drivers for government.
- ☐ Specific government information needs.
- ☐ What this means for a policy brief?
- ☐ Main drivers for industry and peak bodies.
- ☐ What about non-profit organisations?
- ☐ Specific industry information needs.
  - ❑ ACTIVITY 4 - INTERESTS, GOALS & INFORMATION NEEDS

Reflection - what are 3 takeaways for influencing governments?

Reflection - what are 3 takeaways for influencing industry?

ACTIVITY 4 - INTERESTS, GOALS & INFORMATION NEEDS

This activity is aimed at getting you and your Annex team to think about the interests, goals and information needs of your target audience. The aim here is to support any writing you do for this specific audience whether it is the policy brief, executive summary or something for an article, newsletter or social media.

Method:

If you are a small group, have a scribe or a piece of paper for people to write down their key ideas. You can use the table below in Outputs as a starting point, but you may have another way you want to record this.

Step 1 - From your stakeholder map, and your target audience choose the top 5 you want to work with. Write these down on your paper, white board or table, one under the other.

Step 2 – for each ask: what are some important things to keep in mind for each? Write these on the right side of the table.

Output:

The below is a type of table you could use to document your thinking.

STAKEHOLDER	INTERESTS, GOALS & INFORMATION NEEDS

MODULE 4 CHECKLIST – PUBLIC AND MEDIA

Module 4 offers a brief overview of the information needs of the public and the context in which they make decisions on research projects, such as those from EBC Operating Agents. This includes understanding the key information requirements and preferred formats that support these decisions. The module also looks at the different types of media and how Annex outcomes can effectively be used by the media.

The purpose of this module is to clarify what these stakeholders expect from the outcomes of Annex work. It also provides an opportunity to consider how the type of organisation affects the information developed for each sector.

Tick off the elements you have completed

- ☐ Aims and outcomes
- ☐ Case study: how public opinion influenced waste policy
- ☐ Understanding people and the main drivers for public
- ☐ Types of media
- ☐ Main drivers for media
- ☐ Case study: Great Barrier Reef
- ☐ Opinion Pieces in newspapers
- ☐ Strategic approach to reaching the public and media

Reflection - what are 3 takeaways for influencing the public?

Reflection - what are 3 takeaways for influencing media?

Reflection - what are key differences between media types and how should that influence your strategy - i.e. can any of your content be negatively sensationalised?

MODULE 5 CHECKLIST – STRATEGIC SOCIAL MEDIA

Module 5 aims to help Operating Agents and their teams to understand social media and its many platforms. This will leverage the work done in creating the stakeholder map and audience analysis.

By learning about the strengths and uses of each platform, Operating Agents can increase the impact of their work and enhance their careers. Social media provides a valuable way to share research findings, reach a larger audience, and build professional networks. This module will cover which platforms to use, how to use them, and the best times to engage with audiences for maximum effect.

By the end of this module, researchers will understand the key differences between social media platforms and be able to select the most suitable ones for their work. They will also learn how to use a "stakeholder map" to guide the creation of social media content that speaks directly to different groups of interest. Additionally, researchers will understand how to map stakeholders to specific platform types, helping them deliver the right message to the right audience.

Tick off the elements you have completed

- ☐ Aims and outcomes.
- ☐ What is social media good for / how can it increase the impact of your research.
- ☐ Introduction to platforms and parameters.
- ☐ Platform basics and parameters.
- ☐ Where are your stakeholders?
    - ☐ **ACTIVITY 5 – Where are your stakeholders?**
    - ☐ **ACTIVITY 6 – Plan and post**
- ☐ Learn from people doing it well.
- ☐ Top tips.
- ☐ Bringing it all together.

2 takeaways for X (Twitter), BlueSky and micro blogs

2 takeaways for Facebook

2 takeaways for Instagram

2 takeaways for LinkedIn

2 takeaways for YouTube / TikTok

ACTIVITY 5 - WHERE ARE YOUR STAKEHOLDERS?

Activity 5 supports the Annex team to take their stakeholder map and apply it in the context of social media. It supports the team to take the knowledge from this module and think about which platform will work for the outcomes of the Annex research.

Method:

Step 1 - Take your stakeholder map
Step 2 - Take what you have learnt from about each platform
Step 3 - Which platform works best for which audience?
Step 4 - Label the stakeholder map with preferred platform(s)

Output:

The below is a suggested way to collect your thinking on this activity. Once you have taken your stakeholder map and noted down which platforms will speak to which stakeholders, you can summarise it in the table below.

The aim is to write down from your stakeholder map stakeholders that might be able to be reached via the platform.

You will build on this in Activity 6.

Social media platform	Stakeholders you might reach	ACTIVITY 6
X/Twitter, BlueSky and other microblogs		
LinkedIn		
Facebook		
Instagram		
YouTube and TikTok		

ACTIVITY 6 – PLAN AND POST

In Activity 6, participants will work with an executive summary or policy brief from the Annex and a stakeholder map that is matched with social media platforms. The goal is to identify the specific information in the Annex documents that is most relevant for each stakeholder and to decide which social media platform would be best to reach them. This activity encourages participants to think about how to adapt information to the needs of different audiences across various platforms.

The final part of Activity 6 involves creating a plan to build a social media presence for the Annex. By sharing information on platforms where stakeholders are active, participants can increase awareness and understanding of the Annex's outcomes. This way, when a policymaker makes a proposal related to the Annex's work, there is already a network of informed and supportive stakeholders. This approach can strengthen the overall impact and support for Annex initiatives.

Method:

Step 1 - Take your executive summary or policy brief
Step 2 - Take your stakeholder map
Step 3 - Choose the stakeholders to whom you want to draw attention to this work
Step 4 - Create a reference table of stakeholders and their social media channels
Step 5 - Draft posts for each of the platforms, tagging people and organisations where appropriate.
Step 6 - Test it and reflect on feedback.

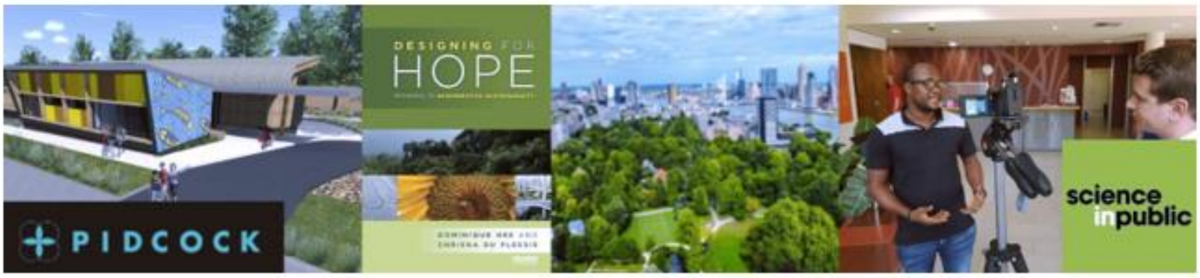
Output

The table below is a way this could be planned and represented. With the list of stakeholders from activity 5 and their relevant platforms, document the outcomes of the above steps.

Think about:

- to have impact what time of day should it be posted (e.g. LinkedIn professionals check before 8:30am, at lunch and after 5pm)
- what should be posted and how (e.g. video, animation, image, text, etc).

Social media platform	Stakeholders you might reach	Content that could be useful for the stakeholder and its format
X/Twitter and other microblogs		
LinkedIn		
Facebook		
Instagram		
YouTube and TikTok		



ALCHEMY COLAB

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