



LAKESHORE NATURE PRESERVE COMMUNICATIONS PLAN DRAFT – v.7

Executive Summary

The 2020-2030 Lakeshore Nature Preserve Strategic Plan identified a need to define and systematically communicate the Preserve's identity, mission, and purpose, highlighting its value for teaching, research, and outreach. Increased awareness will support continued growth in stakeholder engagement, and administrative and alumni support. Stakeholders in the strategic planning focus groups recommended a short-term emphasis on branding and communications. As a result, Strategic Priority #2 of the Preserve Strategic Plan calls for the development and implementation of a Communications Plan.

The overall goal of the Communications Plan is to provide a Preserve staff with a coordinated and documented plan for effective communications that identifies specific audiences, key messages, and defined communication channels for implementation.

More specific goals of the plan are to:

- increase awareness of the Preserve as an outdoor learning laboratory that supports the UW's teaching and research mission as well as a place for respite and wellbeing;
- have strong support from the University through consistent and increased teaching/research use;
- develop graphics and materials that support brand awareness;
- establish connections to other communication programs throughout the university;
- increase private funding through consistent messaging and brand awareness;
- establish metrics to measure success.

The Communications Plan identifies 3 main audiences: users of the Preserve for research, teaching, and outreach; users of the Preserve for respite & wellness, social, environmental, and mental health; and UW-Madison administration and university decision-makers.

The Plan also identifies key messages and divides them into primary, sub-primary, site-facility value, and responsibilities-engagement. **Primary messages** are those that are important for all audiences. They include:

- The Lakeshore Nature Preserve is a 300-acre outdoor natural laboratory for research, teaching, and outreach and an important place of respite and well-being that supports the mental health of all campus users.
- Policies and guidelines are in place for Preserve use.
- UW-Madison and the Lakeshore Nature Preserve occupy the ancestral lands of the Ho-Chunk Nation.

The Plan identifies key milestones/decision points, roles and responsibilities, and a set of deliverables as part of the implementation phase of the Plan. Following Plan approval, the Preserve staff will work with FP&M Marketing and Communications to create additional visual graphic branding materials using a newly established UW-Madison “W-Crest logo” for the Preserve. The team will then prioritize and start to build a set of creative assets (i.e. key templates for the newsletter, annual report, etc.) to make on-going communications easier to implement on an on-going basis. A newly created communications calendar will help manage the calendar of regular communications and identify a set of deliverables and effective communication channels for each audience. Finally, Preserve staff will prioritize deliverable communication projects (along with clearly defined audiences and key messaging) and create an implementation timeline and metrics for each to measure growth and success of the communications program.

Use of the new branding and logo on physical wayfinding and interpretative signage will be included in the 2021 Preserve Master Plan update process and not part of the Communications Plan.

Once implemented, the Lakeshore Nature Preserve Communication Plan will be key to effectively communicating the Preserve’s mission & vision, its core activities, and key strategic initiatives, all in support of the university’s mission of teaching, research, and outreach.

Situation Analysis

The UW-Madison Lakeshore Nature Preserve completed a thorough [strategic planning](#) process in 2019-2020. Identified throughout this process was the role of communications and marketing to support the various strategic plan initiatives, the Preserve’s mission and vision, and create a coordinated and comprehensive communications plan with compelling materials to reach each of the intended audiences through a variety of methods.

Mission: *The Lakeshore Nature Preserve shelters natural environments and cultural resources through active learning, research, and outreach in a place of respite and well-being.*

Vision: *To foster biodiversity on campus and cultivate lifelong environmental engagement.*

Key Opportunities and Challenges

Strategic planning focus groups all supported the on-going need for a strong communications and branding plan. The Preserve has many messages, audiences, and methods of delivery supported by limited staffing making it more important to have a coordinated and documented plan for effective implementation.

Numerous opportunities were identified through the Strategic Plan SWOT analysis including:

- Many academic departments could benefit from better utilization of Preserve outdoor teaching areas
- Increasing recognition of the value of natural areas as a place of well-being
- Picnic Point and other areas within the Preserve hold special memories for many alumni making the Preserve attractive for fundraising

Additionally, a number of weaknesses were identified including:

- Confusion exists regarding who is responsible for and who manages the Preserve
 - Establish a strong brand recognition reinforcing connection with the UW-Madison and supported by communication strategies to targeted audiences with priority messages

- Creation of tool kits, style guidelines and additional resources which will be utilized internally and shared with partners to ensure consistent and accurate messaging
- While a communication plan will enable Preserve staff to work more efficiently, UW-Madison needs to consider increased investment in Preserve staff and student interns to support additional messaging and communications leading to increased fund development opportunities and overall results in meeting the mission of the university.
- Lack of signage, educational and informational
 - The forthcoming Lakeshore Nature Preserve Master Plan update process will address initial planning with specific recommendations for new educational, informational and interpretative signage used in the Preserve.
- Not using the full potential of technology (e.g. apps, virtual field trips and other)
 - With the creation of a communication plan and strategy we will be able to prioritize options and respond to opportunities and needs in a logical process

Communications Plan Goals

- Create strong brand recognition and connection of the Preserve to UW-Madison as a vital asset in support of the university's broad teaching, research, and outreach mission.
- Increase awareness of the Preserve as a potentially premier outdoor learning laboratory and as a place of respite and well-being for all users.
- Drive consistent Preserve use and strong support from the University.
- Develop a new logo, tagline, style guide, and similar graphic elements to support brand awareness.
- Create communication systems and establish campus connections to other communication programs across FP&M and the university to assist staff with ongoing communications and outreach.
- Increase private funding donations by stakeholders through brand recognition and awareness, regular outreach and communications, and consistent messaging in support of the Preserve mission, vision, and core values.
- Establish a metrics dashboard, including segmented audiences, to track performance, evaluate progress, and to measure the growing level of awareness and engagement over time.

Audiences

- Users of the Preserve for research, teaching, and outreach:
 - UW-Madison academic schools, colleges, departments and divisions
 - UW-Madison faculty, staff, students, alumni and campus visitors
 - Research professionals and organizations (e.g. Federal and State agencies, other universities and colleges)
 - Non-Governmental Organizations (e.g. Wisconsin Wetlands, Madison Audubon Society, Natural Resource Foundation, Groundswell, Friends of the Lakeshore Nature Preserve, etc.)
 - Citizen Scientists and citizen science programs
- Users of the Preserve for respite & wellness, social, environmental, and mental health:
 - UW faculty, staff, students, alumni and campus visitors
 - Prospective UW-Madison faculty, staff, students, including use of orientation and on-boarding opportunities for all, (e.g. SOAR, Center for the First-Year Experience, staff on-boarding programs, Campus & Visitor Relations and their tour guides, etc.)
 - Preserve Volunteers
 - Preserve Donors

- Friends of the Lakeshore Nature Preserve
- Special user interest groups (e.g. birders, bikers, photographers, fishing, etc.)
- Casual user/site-seeing visitor to the university
- UW partners (e.g. University Housing, University Apartments, UW Hospital, School of Veterinary Medicine and their hospital and clinic users, UW Athletics fans, UW Arboretum, the Allen Centennial Garden, the Botany Garden users, etc.)
- Wisconsin Foundation and Alumni Association (WFAA)
- UW Administration and decision-makers
 - UW-Madison FP&M leadership
 - UW-Madison leadership
 - WFAA leadership
 - UW System leadership

Implementation Strategy

- Identify priority partners (see Audiences) and how best to engage them in sharing/amplifying communication messages and outreach initiatives
- Focus on key materials and messages that will strengthen the connection between the Preserve and UW-Madison campus faculty, staff, students, alumni, and campus visitors
- Focus on well-being, respite, and mental health by positioning the Preserve as a key resource for these activities on campus
- Create connections with other campus communicators, departments, and programs (features in other university communication newsletters, presentations, Preserve Committee members as ambassadors, etc.)
- Support Preserve outreach efforts with the creation of communication templates and a tool kit that can be implemented more easily and efficiently on a regular basis
- Establish a communications calendar and content systems, as well as flexible creative assets that can be used in a number of ways to support the Preserve Strategic Plan priority, this Communications Plan priority and the university's broad mission & vision
- Strengthen and enhance the Preserve Committee members' role in supporting and implementing the Preserve's messaging

Key Messages & Positioning Statements

PRIMARY MESSAGES

- The Lakeshore Nature Preserve is a 300-acre outdoor natural laboratory for research, teaching, and outreach — as well as a place of respite and well-being that supports the mental health of campus users.
- As a part of the UW-Madison campus, there are defined policies, guidelines and procedures which accommodate facility use, including teaching and research permit requirements.
- The Lakeshore Nature Preserve recognizes that the University of Wisconsin-Madison occupies the ancestral lands of the Ho-Chunk Nation, a place they have called Teejop (day-JOPE) since time immemorial. The Preserve will use the UW-Madison Land Acknowledgement Statement when defined and posted for distribution (decide where/when to use).

SUB-PRIMARY MESSAGES

- The Preserve has a long history as an outdoor classroom and laboratory for many disciplines across the university including Natural Sciences, Biology, Botany, Anthropology, English, Art, and other UW-Madison coursework/research supporting environmental teaching and research.
- The Preserve is an important part of the UW-Madison residential campus experience as it provides space for teaching, research, wellness, well-being, and outreach.

Commented [GAB1]: Note, UW-Madison does not have an official land acknowledgement at this time. Many schools, colleges and divisions have adopted their own to use until such time the university creates an overall acknowledgment for the university.

- Preserve professional staff actively manage and restore ecosystems (plant & animal communities) and foster wildlife habitat as well as maintain created physical infrastructure elements (trails, fire circles, benches).
- Preserve professional staff do not conduct formal teaching and research or respite and wellbeing programming; we provide a space for and facilitate these activities through managing permits, engaging volunteers, and practicing active land management and protection of cultural resources (i.e. Indian burial mounds).

SITE-FACILITY-VALUE

- The Preserve is important for the many environmental and ecosystem services it provides to the university (stormwater management, cooling, wildlife and pollinator habitat, clean air, and human mental and physical well-being). In this very broad way, the Preserve supports the university's comprehensive sustainability goals.
- The Preserve contains important ancient, historic and cultural resources in its landscape from the past inhabitants of this place which serve as powerful symbols of living traditions. See more information on this topic at: [Native Americans and the Preserve](#).

RESPONSIBILITIES-ENGAGEMENT

- It is the responsibility of UW-Madison's Facilities Planning & Management (FP&M) and the Preserve staff to manage and protect the cultural and natural resources in this 300-acre outdoor laboratory on campus.
- The Preserve needs active land management and restoration to support plant and animal communities, healthy soil, and other natural and cultural resources to be an educational and research resource to meet the university's mission
- FP&M and Preserve staff need to maintain infrastructure (trails, etc.) to be a safe and beautiful place to visit for respite and wellbeing.
- Donor partnerships play an important role in the continued, long-term protection and use of the Preserve.
- The Preserve is more than just a place to recreate (e.g., run, walk, picnic); it is also a home for many plants and animals and a place of teaching, research, outreach and learning.
- When people feel engaged in a place, they want to protect it; engagement activities can include volunteering, guided walks, photography, and social media.
- We want the Preserve to be a resource for future generations of Badgers. What we do today impacts the future.
- Working with our various stakeholders and partner organizations (e.g. UW Arboretum, Allen Centennial Garden, Botany Garden, etc.) can amplify our messages across the university and its various teaching, research, and outreach mission-driven programs.

Key Milestones & Decisions

The list of key milestones and decision points shown in the 2020 Strategic Plan have been revised in February 2021 to provide clarity around milestones, roles, and responsibilities as this Communications Plan is implemented.

Milestone/Decision Point 1: Plan approval

- *Description:* The plan is a guiding document to ensure marketing and communications work being done meets the University's and Preserve's overall strategic goals.
- *Recommendation:* FP&M Marketing & Communications staff recommend moving forward as laid out, with an emphasis on alignment with the priorities and key messages stated.
- *Final approval authority:* Preserve staff with review by FP&M leadership and input from the Preserve Committee at their May 12, 2021 meeting.

Timing notes: Once approved, this Communications Plan can be saved with a copy to the Preserve Website and circulated as needed.
- *Timeline/completion:* August 16, 2021

Milestone/Decision Point 2: Branding

- *Description:* The first step in creating visual graphic branding materials is the decision around the Preserve's logo and associated branding elements. With existing graphic standards and guidance for use in place at UW-Madison through University Communications (including standard logos, letterhead use, etc.), the decision is to either continue to use the current Preserve logo or move to the UW-Madison W-Crest brand imagery.
- *Recommendation:* The current Preserve logo was developed in 2006 and has served well for the initial rollout of a new image for what was formerly known as the Campus Natural Areas. FP&M Marketing & Communications staff recommends that the Preserve adopt the standardized UW-Madison W-crest logo. This recommendation considers both key goals and issues presented in the Preserve Strategic Plan process. Using the standard crest logo will help build awareness of the Preserve as a key UW-Madison entity, differentiation of the Preserve from the Friends of the Lakeshore Nature Preserve and will acknowledge the role of the Preserve in research and education on campus. Additional images, photos, and graphic elements can be used to help visualize the work of the Preserve in tandem with the UW W-Crest logo (i.e. photographic banners on the Preserve website, photos in newsletters and annual reports, etc.) yet still maintain the university's common branding graphics.
- *Final approval authority:* Preserve staff with review and input from the Preserve Committee. Preserve staff and FP&M leadership agree this is the right decision to promote the Preserve as being an integral part of the university's mission of teaching, research, and outreach.
- *Timing notes:* Creation of a W-Crest logo and a style guide for use on letterhead, annual reports, newsletters, etc. This needs to include time for University Communications to signoff and FP&M leadership to review and approve.
- *Approved Logo:*



- *Timeline/completion:* June 14, 2021

Milestone/Decision Point 3: Building creative assets

- *Description:* Following the decision on branding graphics, work on building new creative assets can begin. This will be done in two phases: (1) present initial concepts; and (2) build out materials based on priorities determined by Preserve staff.
- *Recommendation:* FP&M Marketing & Communications staff recommends building key templates that will help make ongoing communications easier for Preserve staff to implement on a regular basis. Initial priorities and templates will include: use of logos, fonts, and colors; e-newsletter template; print newsletter template; flyer/poster templates; annual report template; fundraising brochures and social graphic templates. This process will also develop a tagline for the Preserve that will be used in all communications.
- *Approved tagline:*

Lakeshore Nature Preserve - Outdoor Learning is our Point

- **Note:** Use of the new logo on physical signage is a separate project that will come later in the process as all existing logos used in physical signs will need to be updated to reflect the new standard. Also, signage/interpretative guidance will be included in the update of the 2006 Preserve Master Plan.
- **Final approval authority:** Preserve staff/leadership will sign off on the initial concepts and direction. All creative assets will be saved in a Box folder and be made editable.
- **Timing notes:** Initial concepts will take 7-10 business days to complete. This work may take a second round depending on feedback. Typically, subsequent rounds of concept work will take between 3-5 business days. For the buildout of materials, once a priority list is made, the FP&M Marketing & Communications team can create a communications calendar to deliver materials on a rolling basis. Ideally this process overall will take 6-8 weeks.
- **Timeline/completion:** **Need a date**

Milestone/Decision Point 4: Building communications calendar/tools

- **Description:** Following the completion of the overall Communications Plan, key messaging, and definition of key audiences, work on the creation of a standardized outreach calendar can begin. This will largely be a spreadsheet template to help manage the calendar of regular communications including the most effective channels for each audience. Project priorities (audiences/messages) will be identified, timeline established, along with metrics to measure success.
- **Recommendation:** Create a spreadsheet template based on the overall FP&M content/communications calendar and support the Preserve staff to fill in and identify where messages should live and what visual/graphic support is needed for reoccurring or newly implemented messaging. This will help keep us all on schedule and provide a baseline metric for outreach activities and measure success of the Communications Plan and program.
- **Final approval authority:** Preserve staff/leadership
- **Timing notes:** Creation of an overall communications calendar will be a joint project between FP&M Marketing and Communications and Preserve staff. Setting up the initial template will be based on notes included below (in terms of ongoing outreach) but will rely on seasonal news/announcements. Identified new outreach efforts will be included.
- **Timeline/completion:** **Need a date**

Milestone/Decision Point 5: Identify remaining priority projects

- **Description:** Following the creation of the new tools mentioned above, work to outline special and priority projects that can happen and on what timelines to maximize use and benefit to the organization.
- **Recommendation:** Create a timeline and scope of work for standard projects such as the annual report, newsletters, update program overall. These are both large efforts that will benefit from the groundwork in building an overall brand and image, but it will need to have special attention and may require budget.
- **Final approval authority:** Preserve staff/leadership
- **Timing notes:** Timing on this is very dependent on overall goals and the review process. A timeline can be built to include design time once overall timeline for implementation of the Communications Plan is complete.

- *Timeline/completion:* **Ongoing through 2022**

Key Performance Indicators & Metrics

- Timeline/completion dates are provided for Milestone/Decision Points 1 through 4. Completion by these dates will be utilized as key performance indicators. After the communications calendar/tools have been built (Milestone/Decision Point 4), project priorities (audiences/messages) will be identified, and a timeline will be established along with metrics that can measure and report success on each goal using SMART goal structures (specific, measurable, attainable, realistic, time-bound).

Deliverables

This list of deliverables is to be determined through the steps outlined in the milestone areas listed above. Preserve staff and the FP&M Marketing & Communications team expect to review and create a future implementation plan, with deadlines for completion, for the following elements:

- Preserve Graphics Style Guide for regular communications (newsletters, annual report, email, website, permit form/template response, project proposal form, etc.)
- Communication guidelines for partners
- Website updates
- Social media (Facebook, Twitter, Instagram) updates
- Brochures/maps for visitor centers, orientation programs
- Thank you notes and post cards (print and digital)
- Presentations and targeted communications with schools, colleges, and divisions
- Preserve Factsheet updates
- General promotional items for volunteer recognition
- Tabling/Outreach event support (banners, inexpensive giveaways, etc.)
- Photography standard use and organization
- Video standard use and organization

Existing Outreach Topics

The Preserve staff has been conducting outreach efforts for the past decade. The following are examples of the topics that have been used in outreach content that will continue. These topics can be incorporated into the outreach calendar and other communication systems that enhance efficiency for Preserve staff developing and planning outreach and communications content.

Messaging for education/research use of the Preserve to faculty, staff, and students (permit process):

- Schools, Colleges & Divisions
 - Teaching and research
 - promoting this use of the Preserve to UW audiences
 - educating the public and UW about the ongoing use as an outdoor classroom and laboratory
 - stories about research, educators and researchers using the Preserve to advance their mission and the university's mission of teaching, research and outreach
- Student Engagement Grants
- Volunteer recruitment and recognition
 - Students
 - Adult continuing education

Messaging to UW-Madison Administration:

- Value and support for education and research in the Preserve
- Value of environmental/ecological services provided to the university and Madison community
- Value of the Preserve for respite, relaxation, passive recreation and well-being

Development:

- Fundraising Events (for our outreach calendar) and associated promotional materials/assets to support each event
 - WFAA “Fill the Hill” - Fall
 - WFAA “Day of the Badger” - Spring
 - National “Giving Tuesday” - Tuesday after Thanksgiving
 - Preserve Annual Appeal - November/December
- Funding needs – messaging around why donations are important
- Donors
 - Why donors are important
 - What their gifts support
 - Who they are (currently published in our annual report)?

Land Management/Restoration:

- Public notices/education before land management actions take place in the field
- Major capital projects and land management project history/progress
- Education on what goes into managing natural areas and who does the work
- Ecology topics explaining the life history and interactions of the natural communities managed in the Preserve

Cultural and Natural History:

- Native American burial sites / mounds history and interpretation, coordination with Ho-Chunk nation on their history and importance to their cultural history
- Natural history of the site over time from savanna and prairie ecosystems to woodlands, restored prairies and human development on the land
- History of various areas of the land and use by early people
- History of agricultural, research and teaching use over time
- History of housing and residential, farm uses of the Preserve over time

Phenology:

- What’s blooming today, bird sightings, wildlife sightings, weather, etc.

Hands-on experiential learning opportunities (paid and unpaid):

- Student internships
- Seasonal, temporary employees
- Graduate student projects
- Student Engagement Grants