

Promoting Community Action: Campaign Strategies and Communication Guidelines

**Prepared for the
California Department of Forestry and Fire Protection**

Governor
Pete Wilson

**Secretary for Resources
The Resource Agency**
Douglas P. Wheeler

**Director
California Dept. of Forestry & Fire
Protection**
Richard A. Wilson



Hal Voege and Scot Crocker

**The Training Source
1410 Ethan Way
Sacramento, CA 95825**

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Preface

**What is
this
document
about?**

This document presents ideas, guidelines and outlines for positively influencing people's perceptions and behavior. It presents strategies and tactics for creating public awareness and promoting community action. Its purpose is to assist those who create and deliver material to help landowners move from being uninformed bystanders to being active participants. It contains practical examples of effective material. It includes guidelines for presenting ideas in ways that the audience can easily accept and use. And it outlines a foundation in theory and research for understanding why these approaches work.

**Who would
find it
helpful?**

This material may be especially useful to the following people:

- Representatives of resource agencies and members of organizations promoting beneficial land use practices.
- Those involved in educating and guiding local groups and landowners toward increased reliance on local resources.

**What is
included?**

This is primarily an introduction to and an overview of:

- Strategies and tactics for raising public awareness of the issues and their implications.
- Techniques for encouraging adoption of the belief that the issues presented are important and require individual commitment.
- Guidelines for promoting community-wide involvement in actions to produce desired results.

**What is not
included?**

Details of both theory and practice, which go beyond the scope of this document, are not included. The bibliography contains references to more detailed information. Additional information is also available at libraries and on the Internet.

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Introduction

**What is
this
document?**

This document contains a coordinated set of strategies and guidelines for introducing beneficial management approaches to owners of privately held forests and woodlands in California. It is the second part of a study conducted for the California Department of Forestry and Fire Protection (CDF). The report of the first part, titled “How Do Forest Landowners Learn? A Study of Resource Agency/Landowner Interaction in Northern California” (Voegel and Wagner, 1997), includes background material that readers may wish to use as a reference. To obtain a copy, contact the Stewardship Helpline at 1-800-738-TREE.

**What is it
about?**

This guide consists of four discrete components. We begin with an overview of published information regarding several aspects of adult learning. Using the Stages of Learning model, which is discussed in the next section, as a foundation, we blend theoretical ideas together in order to create outlines and guidelines which show how the theory can be effectively applied at each learning stage. Together, the components offer practical assistance to those seeking to create and maintain community involvement in working together toward common resource management goals.

How is it arranged?

The contents are organized into four sections.

1. A brief discussion of the theoretical basis for the outlines and guidelines which follow.
2. A communications campaign strategy guide which can be used as a “what to do” outline for stimulating community interest and encouraging individual participation.
3. A prototype brochure which illustrates points to consider when developing specific campaign materials.
4. A set of illustrated guides for developing written material (pamphlets, booklets, etc.) to build landowner confidence in their ability to carry out the necessary activities.

For which applications?

Although some components are written from the perspective of a specific application (i.e. a community fuel suppression campaign), they can all be used as planning and development resources wherever getting people involved “on the ground” makes sense.

How is community defined?

The word community is used here to represent not only people living in a physical location - a place. Community also represents a *community of interest*, which may be geographically dispersed. We define *community of interest* as: A body of people sharing a set of common perceptions, values, and beliefs based on a common location, setting or purpose.

**Why was
this work
done?**

The impetus for this effort comes from California Department of Forestry and Fire Protection’s (CDF) stated goal of increasing local involvement, capability, and independence in implementing fire safety and beneficial forest management practices.

“Along with the trend in reduced cost share dollars for individual landowners is an increasing interest in solving environmental problems by involving multiple ownerships and agencies. Therefore, it is critically important for the program to place its emphasis on providing education to groups, organizations and landowners that will strengthen their independence and foster reliance on community networks and resources rather than future cost share dollars.” (CDF, 1996)

**Where did
this
information
come from?**

In addition to a review of resource management and stewardship literature, information was collected from:

- Individual interviews with forest landowners and forestry professionals,
- One focus group with agency representatives involved with disseminating information,
- Three focus groups with forest landowners and members of RCDs who reviewed material and offered suggestions.

All told, in-depth interviews were conducted with over 40 people. They were asked to evaluate resource management documents and/or to offer their views on which community involvement strategies were effective and which were not.

Our goal

Ideas spread because people find them attractive. Their attraction begins with the way in which they are presented. We firmly believe presentations that address the audience's level of understanding and commitment, that can overcome doubt and confusion, and that can provide a sense of confidence and control, can substantially affect:

- Awareness of issues and how they affect people's lives.
- The pace of learning new concepts and practices.
- The rate at which ideas spread and are adopted.
- People's willingness to act together to implement beneficial practices.

Our goal in this document is to present an overview and practical guidance for those working toward community-wide adoption of beneficial land management ideas and practices, in order to improve the effectiveness of their community focused presentations and publications.

Section 1

Theoretical Background

Why are concepts important?

Information regarding adult learning and motivation comes from a variety of disciplines. Each of these has something to teach us about how ideas spread, are adopted and practiced. In this work, we have combined concepts that seem particularly relevant to working with landowners, together with their own practical suggestions, to produce guidelines for effective communication and involvement. The concepts outlined in this section are the foundation for the practical suggestions in the following sections.

Which concepts are discussed?

The concepts which form the foundation of this study come from four different areas - education, marketing, social science, and management.

- An adaptation of the Stages of Adult Learning model defines different kinds of information individuals need as they progress through the learning cycle.
- Innovation diffusion theory addresses issues that promote/retard the spread of new ideas and practices in a social system.
- Language triggers minimize the energy a reader or listener needs to exert in order to understand the content of a message.
- Information mapping presents material in a structured way to make it easier to understand and accept.

Applicable points from each of these theoretical perspectives are briefly outlined. More detailed information about these concepts can be found in the works listed in the bibliography.

The Stages of Learning Model

**Why are
Stages of
Learning
important?**

How can Stages of Learning concepts (adapted from O'Connor and Seymour, 1993) be used to promote adoption of new perspectives and new practices by individual learners?

Using these concepts allows information to be presented when audience members are most ready to accept and use it. At each stage, audience members need different kinds and levels of information to move to the next stage. The approach centers on questions that are important to learners at each stage. It increases the rate at which new perspectives and practices are adopted by enhancing an individual's sense of competence and control. It assists presenters by clarifying which information audiences will find relevant at each learning stage. Briefly, these are the four Stages of Learning.

**Learning
Stage 1**

Ignorance (I don't know that I don't know.) The goal is to replace ignorance of issues, problems, and solutions with awareness and desire to learn more.

- Creates public awareness about the issues and their implications.
- Is on-going activity based around a communications campaign plan, primarily using printed and visual media.
- Addresses the audience questions: "Why should I care about this? How does this affect me?"
- Requires research in order to understand the audience's perceptions, values, and communications behavior.
- Avoids all unfamiliar terms and jargon.

**Learning
Stage 2**

Confusion (I know that I don't know.) The goal is to reduce confusion and uncertainty, and encourage audience members to take action with help from others.

- Educates to reduce confusion, persuades individuals to adopt desired viewpoint, and motivates them to take action.
- Defines specific problems/practices and illustrates them using “What to do - What to avoid” terminology and “before-after” examples.
- Addresses the audience questions: “What should I be doing? How will doing it benefit me?”
- Avoids technical detail and jargon wherever possible. Focuses on what needs to be done to address the issues raised in Stage 1, not the specific details of how to accomplish the steps.
- Works best when it combines media with personal interaction and the opportunity to observe process and outcomes.

**Learning
Stage 3**

Confidence (I know that I know.) The goal is to help audience members build confidence in their ability to take action to solve problems, and to move toward mastery.

- Instructs individuals in the specific steps they can take to resolve the issues defined in Stage 2, and includes enough detail to promote a sense of conscious confidence and control in carrying out the steps.
- Follows a step-by-step “cook book” approach, and includes alternatives wherever possible.
- Addresses the audience questions: “What steps are involved in this practice? What resources and skills are required for each step?”.
- Defines technical details using easily understood illustrations and examples.
- Works best when combined with the assurance that technical assistance is easily accessible.

**Learning
Stage 4**

Mastery (I can just do it.) The goal is to create more leaders, teachers, and knowledge resources at the local level.

- Assists individuals in maintaining mastery of the concepts and practices and keeps them informed.
- May require using Stage 2 or Stage 3 approaches to introduce new perspectives or practices.
- Addresses the questions: “How can I maintain my competence in this area? How can I assist others to gain competence?”
- Provides new information to stimulate continued motivation and maintain confidence.

Often combines newsletters, technical bulletins, or other publications with practice sessions and seminars to improve skills, share information, and create networking opportunities.

Innovation Diffusion Theory

How do ideas spread?

What persuades people to adopt a new practice or strategy?

Innovation diffusion theory, a branch of social science, suggests that:

- “The degree of *relative advantage* [the perceived benefit of a new practice over a current practice] may be measured in economic terms, but social prestige, convenience, and satisfaction are also important factors. It does not matter so much if the innovation has a great deal of objective advantage. What does matter is ***whether an individual perceives the innovation as advantageous.***” (Rogers, 1995, chap. 1) [emphasis added]
- “Compatibility is the degree to which an innovation is perceived as consistent with the existing values, past experience, and needs of potential adopters.” (Rogers, 1995, chap. 6)
- “Complexity is the degree to which an innovation is perceived as difficult to understand and to use.” (Rogers, 1995, chap. 1)

Why does this matter?

The degree to which members of a community feel comfortable that a new practice has relative advantage for them, is compatible with their existing beliefs, and is not overwhelmingly complex, directly influences their rate of adoption. Adults have a strong need to know *why* they should learn. Diffusion theory suggests some of the underlying issues to address in order to make information meaningful. Material that addresses landowner doubts and increases their comfort, and maximizes the rate at which new ideas or practices take hold in a community.

**Future
danger is
not a
current
threat**

Rogers also points out that a practice that seeks to prevent or reduce a future danger (such as fuels reduction to reduce the danger of wildfire) has a particularly slow rate of adoption, since its benefits are distant in time. Thus, it is important to emphasize the more immediate advantages of such a practice in order to increase its rate of adoption.

Influencing Language

**What effect
does
language
have on
acceptance
?**

Charvet (1995) describes six language triggers that minimize the energy required to effectively understand messages. She demonstrates ways to overcome barriers created by how the ideas are presented. These language concepts are especially important when developing written material where the opportunity to correct reader's reactions does not usually exist.

**Direction
is key**

Of the six concepts she describes, *Direction* seems particularly pertinent. Direction has to do with either *moving toward a goal* or *away from problems*. Language aligned with the reader's Direction increases their ability to understand, accept, and adopt the ideas presented.

**How
Direction
affects
perception**

Much of the written material reviewed in the development of this guide tended to move toward a goal, e.g. making the landscape fire safe. (Note: Wildfire is a future danger.) Many of the workshop participants tended to be motivated to move away from problems, e.g. avoiding the immediate cost and labor of cleaning up their property, or the cost and complexity of permits. On this basis, some of the material presented to participants was described as “airy - fairy” or “pie in the sky”. These comments applied more to the presentation than to actual content of the documents.

**For more
information**

All six language concepts described by Charvet are discussed in more detail in Chapter 2, Section A of “How Do Forest Landowners Learn?” and in her book.

Information Mapping

**How can
presentation
influence
acceptance
?**

Written material that describes new or complex concepts will be more easily understood and accepted if a formal structured presentation method is used. One such method, Information Mapping (Horn, 1993) defines the following sequencing and formatting principles:

- *Chunking* - Organize the material into chunks the reader can understand and digest. Arrange the chunks in a logical progression from simple to complex. Build on what the reader already knows. (Note: this is not the same as arranging chunks from theoretical to practical or chronologically.) Chunking involves organizing the material into bite-sized pieces.
- *Relevance* - Include ideas, concepts, or practices that relate to the point of that chunk, and exclude those that do not, or that distract from the point.
- *Consistency* - Organize the chunks consistently. Readers readily adapt to a repeated progression of information. Changing that progression causes confusion. If in doubt, leave it out, or create a new chunk. Assure that terms are non-technical or are clearly defined if they are technical, so they are understandable to the reader.

- *Labeling* - Provide the reader with a label for each chunk that describes its relevance. Use terms consistently in the chunk and in its label. This leads the reader through the material, improves clarity, and illuminates the organization of the material.
- *Integrated Graphics* - Whenever possible, use integrated tables, illustrations, and diagrams. to make the point. Use the words to describe the graphic and to draw out implications that may not be clear. Include graphics that relate to the point of the chunk, avoid using graphics to make the document “pretty”.
- *Accessible Detail* - Include only the level of detail necessary to make the chunk useable to the reader. For example, a South Carolina best practices manual was generally seen as a good Stage 2 document in the groups, but it included a section describing culvert sizing that was seen as an unnecessary detail at that stage, and a distraction.
- *Hierarchy of Chunking and Labeling* - Group small chunks together around a theme topic, and give the group theme a label to increase clarity.

**How does
this help to
increase
readability?**

Using a structured presentation method makes both writing and reading easier. It reduces development time, decreases reading time, and makes the document appealing to use. It helps keep the reader from becoming lost in the words. This document makes use of many of the principles described above.

Section 2

Learning Stage 1 Community-Based Strategy and Communications Campaign Prototype

Why have a Stage 1 Campaign?

In our review of resources management literature, Stage 1 learning requirements were most often overlooked. Yet, in focus groups and interviews, participants often stated the belief that they and their peers would be eager to have Stage 1 material and would use it. Clearly, there is a gap in perception. In this section, we suggest a broad outline for bridging that communication gap. Stage 1 is directed at introducing an idea and/or practice to a community in a way that lets community members see its importance for their specific situation, and choose to take an active part in its implementation. Situations differ but, in general, the strategies and tactics suggested here point the way to assisting uninformed bystanders to move toward the decision to adopt an idea or practice. Along the way, their concerns and doubts are addressed and opportunities to discuss and observe the idea in practice are provided. Some of the tactics included here overlap into Stage 2, however, when dealing with a community, some overlaps are useful for continuity.

The basic concept

In this prototype, we have selected the concept of community responsibility for fire safety and fuels reduction as the focus of the outline. The strategies and tactics suggested here could be equally effective in introducing other concepts. Since this is an outline, specific details have been omitted.

Prerequisites for a campaign

Every effective introduction of a new idea begins with an understanding of the concerns and needs of the community being addressed. In other words, the first step is always research. In order to develop measurable objectives, key messages and an effective approach, it is critically important to understand the audience. The presentation must reflect what is important to them. This defines the foundation strategy upon which a successful campaign is built.

Strategic overview

Based on our hypothetical foundation strategy, we suggest eight strategic steps for this campaign.

1. Develop a program plan,
2. Develop a campaign theme,
3. Develop media and documents
4. Develop a distribution strategy,
5. Create workshop opportunities,
6. Develop a community relations strategy,
7. Develop and implement a publicity program,
8. Develop demonstration sites.

Requirements for the model

Any model for community-based programs must be basic in design, easily understood, and simple to implement. Confusion would disengage landowners, local organizations, and communities from the process and its objectives. In the proposed communications model, two elements must be present:

- Appropriate information and messages that have a persuasive ability to motivate landowners to specific actions,
- Trusted communications channels that ensure the messages are delivered.

Measurable objectives

A campaign needs goals that can be used to measure its effectiveness and to point out areas for possible improvement. These need to be followed-up at the end of the campaign to accurately determine what worked and where other approaches might work better. For this example, we chose these measurable objectives:

- Build capacity at the local level.
- Empower local communities to guide themselves toward beneficial management activities (e.g. fuel reduction, fire safe landscaping, etc.).
- Provide effective learning processes for audiences within the community.
- Make the concepts meaningful by focusing programs around specific activity.
- Gain community recognition for concepts, programs, and participants.

Key messages

Key messages address issues that prior research have shown are important to community members. The messages indicate how the proposed concepts and practices address those issues and why they are important for community members to consider. The key messages in this example are:

- Landowners are threatened and affected.
- Inaction costs money.
- Money spent in fuels reduction is a good investment.
- Solutions are easy when everyone works together.
- Stewardship is landowner based and under local responsibility.
- Stewardship activities provide protection for family, friends and community.

The approach

The communications approach recommended here is primarily directed at Stage 1 learners. It includes two components:

- Development of a specific program for addressing community concerns under the banner of wildfire threat reduction.
- Application of communication strategies and tactics to ensure successful implementation of the program.

All the strategies and tactics suggested here may not be needed of a specific campaign, nor do they need to be performed in exactly the order listed. Whether they are used or not, they should all be carefully considered.

Initial program development

The basic program approach includes:

- Development of a local action team focusing on fuels reduction (or any other beneficial management practice) to plan and create:
 - ◇ informational workshops
 - ◇ demonstration site events
 - ◇ landowner direct participation
- Involvement by RCDs, community leaders and CDF and/or other resource agencies.
- The local action team, with guidance from communications or public relations professionals, to provide:
 - ◇ communications tactics
 - ◇ media relations
 - ◇ organizational support

Know your audience

Foundation Strategy

Every community and region has relative degrees of norms, behaviors and feelings. In planning any given campaign, an understanding of the norms, thoughts, feelings, and behaviors, helps ensure successful strategies. The foundation strategy is the research phase for a targeted campaign.

Tactic a.

Review and analyze how ideas spread through the targeted community, and identify people whose opinions are sought out by community members.

Tactic b.

Research the values, attitudes and important issues within the community.

Tactic c.

Identify the local organizations best suited to lead the campaign or join a coalition in support of the campaign.

Tactic d.

Identify local government agency personnel who will work effectively on this campaign together with landowners and local organizations.

Tactic e.

Ascertain the training requirements needed in the areas of technology, communications, organizational development and coalition building.

Tactic f.

Use surveys and interviews to identify words, messages and images that will engage a positive emotional response to the campaign, in addition to identifying landowner concerns and any incentives needed for full participation and support.

Tactic g.

Discover effective ways to rally people around appropriate issues and avoid hostile reactions from opinion leaders.

Strategy 1

Develop a plan

Develop a program plan guide, an outline describing the scope and anticipated outcomes of the campaign. This plan is a road map for local action committees to complete a campaign that results in landowner activity to reduce fuel hazards.

Tactic 1a.

Recruits campaign and program leaders who will assemble a local area action committee of landowners, resource personnel and community leaders.

Tactic 1b.

Hold planning meetings, assign responsibilities and develop timelines. These meetings become the basis for the program plan guide.

Tactic 1c.

Write a program plan guide that details every step of the fuels reduction program under the concept of stewardship.

Develop a theme

Strategy 2

Develop a campaign theme for all locally based stewardship activities that provides a positive image that can be embraced by the target audience.

Tactic 2a.

Campaign theme to have visual and copy impact. Example:

Your Land -

Your Community -

Your Decision!

The media effort

Strategy 3

Develop Learning Stage 1 fuels reduction/stewardship literature, media, and documents to encourage involvement and increase the desire in landowners to learn more about the local program. These materials illustrate the communication points necessary to gain audience acceptance of the community-based program and learn about specific activities that provide personal benefit.

Tactic 3a.

Produce campaign brochure with 25% focus on stewardship and 75% focus on fuels reduction program. Stress benefits of reader (landowner) involvement, and promote curiosity to learn more. Brochure will be light on text with strong visuals and graphics. Project a positive image.

Tactic 3b.

Produce an introduction letter that will be sent in a direct mail campaign to landowners. Letter will accompany brochure and possibly include an invitation to workshops.

Tactic 3c.

Produce an invitation/flyer inviting landowners to the demonstration site to help their neighbors in fuel reduction efforts and to learn from experts the process for fuel reduction techniques.

Tactic 3d.

Produce a counter display announcing stewardship concept and fuel reduction program for public locations including post office, fire and CDF department offices, libraries and schools.

Strategy 4

**Create
strategies
for
distribution**

Develop distribution strategies to ensure information is disseminated to appropriate audience members.

Tactic 4a.

Develop a database of landowners in the targeted geographic area. Include name, address and phone number.

Tactic 4b.

Mail campaign brochure with letter to database list of landowners.

Tactic 4c.

Distribute campaign brochure through community relations activities and presentations within the community.

Tactic 4d.

Distribute brochure with counter display at public locations.

Strategy 5

Develop workshop opportunities

Develop workshop opportunity for landowners to learn more about fuels reduction program benefits.

Tactic 5a.

Select a workshop site and plan a 1.5 hour event to introduce the stewardship concept and fuel reduction program in a light, Learning Stage 1, type of communication style. Focus on peer-to-peer presentations, and the benefits of landowner participation. Avoid authority figures as presenters.

Tactic 5b.

Coordinate invitation to workshop with letter and brochure mailing.

Tactic 5c.

Conduct telephone follow-up to landowners to reiterate invitation and gain RSVPs.

Tactic 5d.

Send follow-up letter to workshop attendees thanking them for attendance and encouraging them to continue to learn more about the stewardship concept and fuel reductions program.

**Develop
community
relations**

Strategy 6

Develop a community relations campaign that informs influential community leaders and other constituencies of the importance of stewardship, its benefits to the community and how to apply stewardship specifically in the fuels reduction program. Community relations will also be used to recognize participants in the local action committee and others who are volunteering time to make the program successful.

Tactic 6a.

Identify opportunities for presentations to community groups that include or have influence over landowners. Schedule engagements leading up to workshops and demonstration site events.

Tactic 6b.

Develop overhead presentation for speaking engagements.

Tactic 6c.

Conduct speaking engagements and distribute brochures to attendees.

**Get
publicity**

Strategy 7

Develop and implement a publicity program. Use media to inform landowners and the community of the stewardship concept and fuels reduction program. The media will provide the program with credibility and notoriety, help recognize participants, provide peer-to-peer incentives and reach reluctant landowners.

Tactic 7a.

Develop a media kit of background material that helps media people understand the issues, and produce news releases that position various story angles.

Tactic 7b.

Distribute information to media, and lobby for coverage regarding “problems” with fire danger and “solutions” with fuel reduction efforts. Also promote the concept of stewardship.

Tactic 7c.

Lobby media to gain editorial support for stewardship and fuel reduction programs.

Tactic 7d.

Respond to articles and “editorials” with letters to the editors in support of program and the importance of local involvement.

Tactic 7e.

Lobby media to attend demonstration site events and develop stories about landowners learning how to improve their skills at fuel reduction on their property. Present demonstration site events as examples of positive stewardship initiative.

Tactic 7f.

Lobby media to provide success story coverage of landowners who implemented fuels reduction programs after attending the demonstrations. Success stories will take the form of positive recognition of landowners participating in stewardship.

Strategy 8

Develop demonstration sites

It is important for landowners evaluating a new concept or practice to be able to visualize how it might work on their property before they make a commitment. Develop demonstration site events that capture community spirit and show landowners the step-by-step process and ease of fuels reduction efforts.

Tactic 8a.

Secure demonstration sites.

Tactic 8b.

Plan demonstration activities with resource agencies and local experts.

Tactic 8c.

Gain involvement from local community organizations such as the Boy Scouts and Girl Scouts, homeowners associations, PTA, fraternal organizations, etc.

Tactic 8d.

Coordinate activities at the site to give the event a “festive” feel including food and refreshments, music and exhibits with additional information for landowners.

Tactic 8e.

Gain commitments from landowners to implement fuel reduction programs on their properties. Provide support and resource materials to help with specific “how-to” information regarding fuel reduction activities, and to answer their questions.

What is not included in this campaign

Since the focus of this communications campaign is on strategies to raise community awareness and promote active involvement, the logistics of planning and implementing the actual work are not discussed. The work itself will naturally follow a parallel path.

Section 3

Prototype Brochure

The brochure presented on the next two pages demonstrates key concepts for creating reader interest that will allow media message to come through to Learning Stage 1 audiences. It demonstrates communications concepts and is not designed for any specific campaign.

Position	Reference	Instruction
Cover of Brochure	A	Apply a cover headline that is informative and that drives curiosity in the reader.
	B	Try to identify the audience in words and pictures.
	C	Use photos and graphics on the cover that have meaning and relate to the audience. Try to strike an emotional chord in artwork.
Title Page Of Brochure	D	Start with a general overview of brochure content.
	E	Use strong, captivating headlines expressing benefits.
	F	Use photos, pull-quotes or text boxes as graphic elements.
	G	When appropriate, write in a conversational style to promote readership.
	H	Use good-quality photos, graphics and illustrations to help tell the story or communicate information.
	I	Be clear and concise in chunking copy.
Inside Brochure	J	Use strong headlines.
	K	Write with action verbs instead of passive verbs.
	L	Write to the audience.
	M	Use white space. White space is more reader friendly.

	N	Don't crowd text and graphics.
Back of Brochure	O	Include call to action. Tell the reader what you want them to do with the information you are providing.

Section 4

Guidelines for Developing Stages of Learning 2 & 3

Written Material

**What is in
this
section?**

This section combines theory and practical suggestions into guidelines for overcoming common problems in developing effective written material for readers at Stages of Learning beyond Stage 1.

Where do these guidelines come from?

In our focus groups and one-on-one interviews, landowners expressed their perspectives regarding written material they reviewed, and suggested improvements. Some of the material appealed to them and seemed easy to use; other material seemed irrelevant, unpersuasive, or difficult to use. The guidelines suggested here combine their ideas with the preceding theory to describe a unified approach to promoting the adoption of new ideas.

How is this section arranged?

This section applies theory and workshop suggestions to written material being developed for Learning Stage 2 and Stage 3 audiences, and is applicable to Stage 4 audiences as well. It addresses focus and presentation rather than content. It begins with a list of specific challenges not met in ineffective material. Considerations and suggestions for presenting material follow this.

Guidelines for each learning stage are presented independently, since, in a real sense, they have different focuses, and require different presentation methods.

For each stage:

- an overview is provided and general issues are discussed,
- practical suggestions for improvement are given,
- examples from reviewed material illustrate the points.

Many of these points were discussed in an earlier report titled “How Do Forest Landowners Learn?” (Voegel and Wagner, 1997). Theory was described in chapter 2, and workshop results in chapter 3, section C. The reader is urged to use this report as a reference. To obtain a copy, contact the Helpline at 1-800-738-TREE.

Challenges for Writers to Overcome

What kept interviewees from accepting the content?

Material which the people we interviewed found irrelevant, dull, or difficult to follow, often did not apply the Stages of Learning model or use innovation diffusion research findings. It did not contain motivational triggers to focus their attention on the content of the information. Its structure made assimilating and adopting new information difficult. And it contained many of the following roadblocks to acceptance.

**Specifically
, what
bothered
them most?**

The material was often oriented toward what the writer thought was important rather than what was important to landowners' specific situations.

- The focus was often on communicating facts or information (teaching) rather than on encouraging landowners to action.
- The presentation was often “wordy” and difficult to follow.
- The material was often presented from the writer’s perspective rather than the reader’s perspective in the following ways:
 - Viewpoints and values the writer favors were assumed. Readers may not share them, or may see them as opposed to goals they value.
 - Scientific or jargon terms and abbreviations, which landowners find intimidating, were often used unnecessarily and/or not clearly defined.
 - Presentations relied heavily on verbal rather than graphic presentation methods.
 - Practices were proposed that landowners did not perceive as advantageous in cost or effort compared to current practices.
 - Material related to several Stages of Learning was often lumped together without clear separation or progression.
 - Action steps were either not described in enough detail to create a sense of confidence that the reader could carry them out, or were described in such elaborate detail that they created confusion.
 - Local or easily accessible sources of additional information were sometimes not included.

Considerations for Stage 2 Learners

Overview

Stage 2 landowners have heard about a new practice, may acknowledge its importance, but do not clearly understand what needs to be done or the benefits that doing it may bring them. They are confused and uncertain about actually engaging in the practice.

Printed material at this stage should be directed at addressing their misgivings and increasing their certainty by clearly describing innovations and their implications. It should address their doubts by illustration and example. The decision to act will probably require more than printed material. The opinions of influential community members, opportunities to observe the practice, and time to think about it, may all be involved. While printed material alone will probably not move them to Stage 3, it does provide an important information base and a handy reference.

The Stage 2 goal

The goal of a Stage 2 document is to educate and persuade the reader to adopt a course of action, not simply to distribute information. Presentation must take landowner issues into consideration. These issues will not be clear without carefully listening to landowners before attempting to create the document.

Issues to address

In general, issues of five types will come up in some form.

1. *What are the relative advantages of this practice compared with current practices on my property?* These are questions of perceptions and values as much as questions of hard facts.
2. *What are the potential disadvantages of this practice?* Here the question may be incompatibility with the planned use of the property or difficulties in implementing the practice.
3. *What are the costs in money, time, labor, and risk of this practice on my property?* It is important to include ways to minimize costs and personal risk in order to gain acceptance, but cost estimates should be realistic.
4. *How complicated is this process, is it beyond my ability?* Reducing perceived complexity would hasten adoption of the new practice.
5. *What sorts of assistance are available to help me?* Knowing help is available may be important in influencing the decision to act.

The basic question for Stage 2

It is important to recognize that most of these issues involve “What” questions, not “How to” questions. The basic question to address is “What should I do, given my values and resources, and what benefits will doing it bring to me?” Explaining to the reader how to go about the process will not address this question. Readers, at this stage, need a clear sense of what is required, and assurance that the new practice is beneficial for them.

**The
importance
of
perception**

It is also important to recognize that these issues involve perception, more than fact. Facts are less important than landowners' reactions. Thus, landowners' perceptions must be clearly understood. Research into perceptions should precede development of presentations. Landowner perceptions must be addressed for a Stage 2 document to be effective. Stage 2 documents can make use of concepts already introduced in Stage 1.

Some Specific Stage 2 Suggestions

**What's in
this
section?**

This section describes, with examples, the good and bad points of some of the Stage 2 materials reviewed for this study. These examples will be used to clarify points made in the earlier discussion. They are intended to illustrate the points being made, not to criticize the documents.

**Start with
an overall
theme**

Many of the documents reviewed tended to lump several themes together, perhaps in order to communicate as much information as possible. This is usually counterproductive. Start with one viewpoint or practice the reader should adopt. Make sure the writer clearly understands the implications of adopting this viewpoint or practice. Readers sometimes resist something new because they believe, based on other information, that it is counterproductive. A new practice can have unanticipated, undesirable consequences as well as anticipated, desirable ones. Try to ensure that readers do not reject the innovation because of them.

Keep the theme simple and concrete. “Reducing the Wildfire Threat” is a simple theme that is made concrete by the illustration of a wildland home burning. This is the cover of a Stage 2 brochure which will immediately attract landowners who are aware of the potential threat. (See example 1.)

EXAMPLE 1

A Property Owner's Guide to Reducing the Wildfire Threat



**Produced as a Public Service by the University of California, Cooperative Extension, Amador County
Principal Author: Delbert S. Farnham, UCCE County Director/Farm Advisor, Amador County**

Relate to the reader's perspective

Assuming the readers understand the concept behind the theme, then ask, “What keeps them from adopting it?” It is dangerous to assume the answer. Instead use the concepts that Innovation Diffusion Theory suggests to find out what they find attractive and what causes them to hesitate. Develop the document around these criteria. Be specific. A longer document that addresses the landowner’s perspective is much more effective than a shorter one that uses generalizations.

Use effective language

If readers hesitate to adopt an innovation because of an “away from” orientation, use language triggers that address that orientation. A set of examples illustrating all the language triggers can be found in “How Do Forest Landowners Learn?” beginning on page 11.

An ineffective example

A recent publication (example 2) is an example of what *not* to do. Workshop participants saw it as pretty but not important. It loses impact in the following ways:

- It is much too short to carry the message convincingly (6 panels).
- It assumes the reader shares the writer’s perspective.
- It is fact oriented and not persuasive.
- The illustrations are not clearly tied to the text, or to landowner values, so they lack impact.
- Landowners bristle at the implication that problems are somehow their fault.
- No specific, local, sources of additional information are provided.

EXAMPLE 2

BENEFITS OF

Forest Management

FOR OWNERS OF SMALL PROPERTIES



Two of the major landscape changing events in the Lake Tahoe region continue to be fire suppression and timber harvest restrictions. The result has been unnaturally thick forests, increased risk of disease and insect epidemics, and, in turn, increased fire danger. The conflicts that arise between natural ecological processes and expanding development into California's forests have created the need for improved management by property owners.



This pamphlet discusses the ecological and economic effects of forest management on small private properties (less than 5 acres), based on a study at Lake Tahoe (Hanna, 1996; Hanna, Thompson, Piirto, and Noel, 1996).

ECOLOGICAL REALITIES

Disease and insects are a permanent and natural part of forest ecosystems. Outbreaks of these agents are natural or even human-caused. Such is the case at Lake Tahoe where periodic climatic stresses have heightened forest health problems due to human controls. Fire would have been the agent to thin the forest but now it is excluded because of the need to protect people and property. Further exaggerating the problem is a tendency by many to save every tree.



Use chunking

Arrange chunks of information from the reader's perspective. A question the reader would naturally ask is often an effective introduction. The introductory paragraphs entitled "Summary" in example 3 deal with technical information and history. A more effective introduction would have been the question near the end of the third paragraph. "Your buildings can be rebuilt but how long will it take to replace your trees?" That concept is simple to understand and can be used to build a progression of chunks that lead to the requirements in the first paragraph. Include what is relevant in each chunk. Leave out what is not relevant, even if it is a point the writer likes. Avoid history except where it is relevant to the reader.

EXAMPLE 3

Summary

Wildfire hazards are critical on many foothill and mountain home sites and business properties in California. Available research indicates the current 30 foot defensible space requirements required by California law should be revised to 100 feet on level parcels and up to 400 feet downslope on steep parcels.

Property owners and neighborhood groups must take steps to improve the survivability of their structures and of trees which make their property more desirable. Thinning out trees and removing shrubs and other flammable vegetation will help assure the survivability of the remaining trees. Researchers have found that thinned pine trees are more likely to survive bark beetle attack because of less competition for water.

History shows us that the native trees and shrubs are fire-adapted plants which have developed with fire and will burn. The question is, "When will a fire happen in your neighborhood?" Your buildings can be rebuilt but how long will it take to replace your trees? These guidelines are presented to help you take control of the situation.

Integrate graphics

The old adage goes, "A picture is worth a thousand words", yet most of the material reviewed relied primarily on text. Tables, illustrations, diagrams, and graphs are powerful tools for increasing understanding and acceptance.

Photos can be compelling

Photos are expensive to reproduce clearly but “Before-After” pictures can be very effective in helping the reader understand a concept. Use them at the beginning; use drawings later. The pictures in example 4 combine dramatic before-after photos, large enough to show detail, with text that draws out the implications in the pictures. Pictures are only justified if they carry the point. Pretty or poorly printed pictures are a distraction.

EXAMPLE 4

PRIOR TO MANAGEMENT CHANGE



Poor condition - Grass/Shrub riparian environment; Bear Creek, Bureau of Land Management, Prineville, Oregon. Management: May through September grazing.

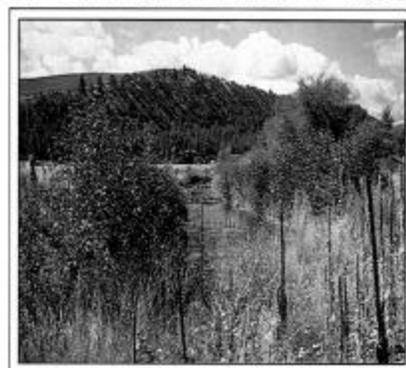


Poor condition - Riparian habitat; private land, Fifteen Mile Creek near Dufur, Oregon. Management: Continual use by livestock and farming along with periodic channelization work following flood events.

AFTER MANAGEMENT CHANGE



Good condition - Grass/shrub riparian environment. Management: Following five years of rest from grazing, Feb.-Mar. grazing use was initiated. Livestock use has increased from 72 A.U.M.'s to 313 A.U.M.'s in just 10 years.



Good, but still an improving riparian condition. Management: Four years of rest from grazing and farming practices along with limited rock riprap where severe bank erosion had occurred. Improved riparian condition eliminated need for annual rechannelization.

NOTE: In these three cases grazing was shifted to other pastures during the rest period with

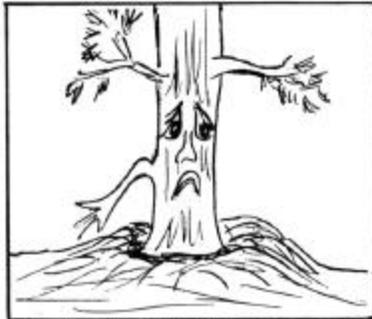
Line drawings illustrate the point

Line drawings are more effective in many cases, and often much less expensive than photos. Line drawings can be used to illustrate a point while leaving out distracting elements. Example 5 shows an inexpensive way to graphically reinforce the message, and attract the reader's attention.

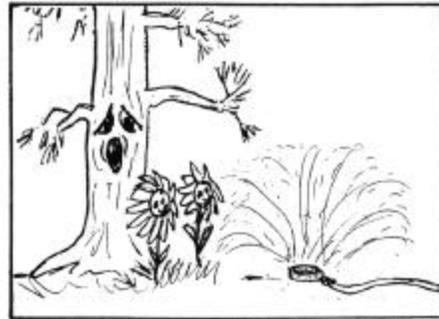
EXAMPLE 5

5 *Avoid placing water-dependent vegetation beneath native trees. Excess watering is harmful to the native trees. Placement of sprinklers should also be considered for the same reason.*

6 *When landscaping do not place dirt (fill material) around trees.*



Don't pile fill dirt around tree trunks.



Don't plant non-native plants near native trees.

EXAMPLE 6

STREAMSIDE MANAGEMENT ZONES

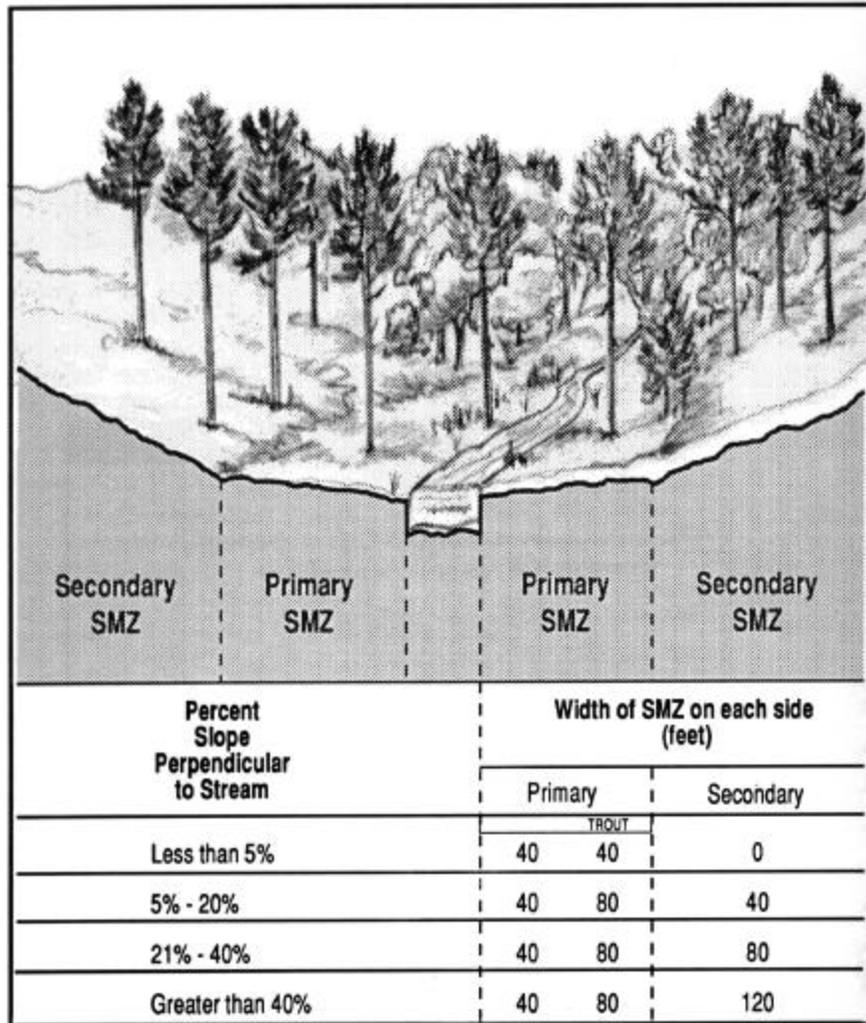


Figure 2. Recommended primary and secondary Streamside Management Zone (SMZ) widths for perennial and intermittent streams.

Example 6 combines a drawing with a table to clarify the abstract concept of a stream-side management zone.

Use graphs to display the story

Graphs can convey a great deal of information and still be appealing, interesting, and informative (example 7). Effective graphs clearly describe relationships. Use graphs only where necessary; an abundance of graphs can be intimidating to the reader.

Carefully designed graphics do not just present information, they tell a story. For a more detailed discussion of graphic presentation concepts and ideas, see Edward R. Tufte (1983, 1997).

EXAMPLE 7

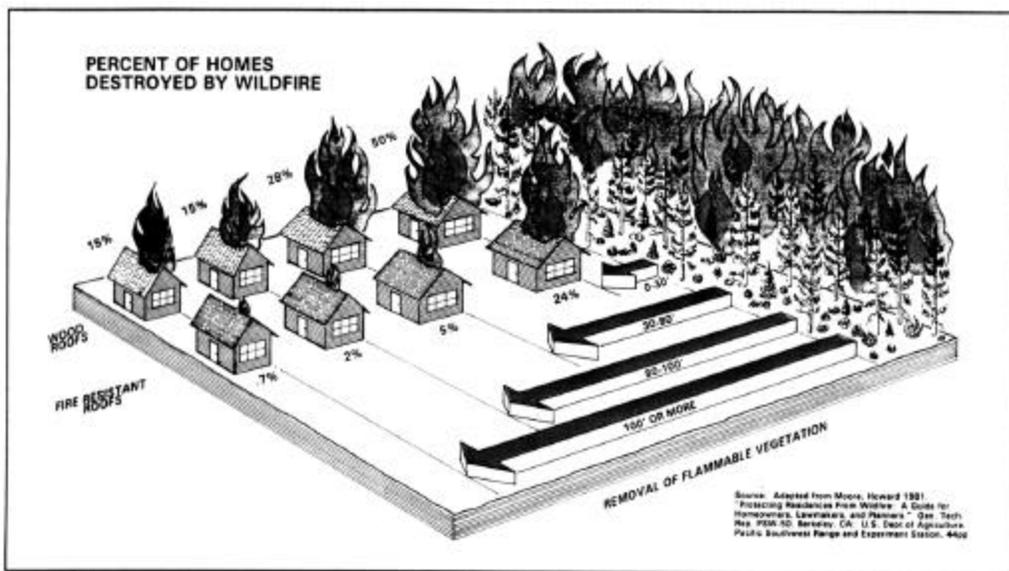


Fig. 1 - Percent of Homes Destroyed by Wildfire by Roof Type and Extent of Removal of Flammable Vegetation

Put people in the picture

Material we reviewed tended to rely heavily on pictures of the natural environment. Readers are people and they relate much more easily to illustrations that contain people than to pictures of trees or meadows. If the goal is to encourage people to adopt a perspective or behavior, illustrations that show people engaged in doing it are very persuasive. It is possible to draw out implications by illustrating how people are affected as a result of their choices. Illustrations containing people can be used to reduce doubt and confusion.

Use “What to do - What to avoid” boxes

Describing a practice in Stage 2 involves showing the reader what to do and what to avoid, not how to perform the practice. “Do-Avoid” boxes are a useful way to summarize the information. The boxes in example 8 highlight the information and are easy to find. Items in boxes should be understandable to the reader based on the material that preceded them.

EXAMPLE 8



■ BMPs

- Comply with smoke management guidelines. Smoke should be monitored after the burn until it is no longer a hazard.
- Have firefighting equipment readily available.
- Time prescribed fires so that the moisture level of the forest floor prevents the entire humus layer from being burned.
- Locate firebreaks on the *contour* as much as possible.
- On *grades* over 5 percent and over 200 feet long, construct *water bars* in firebreak lines at frequent intervals to slow surface runoff.
- Use hand tools when it is necessary to tie firebreak lines into stream channels.

● Avoid

- Burning when conditions will cause a fire to burn too hot and expose mineral soil.
- Impacting smoke sensitive areas.
- Allowing high intensity fire to enter *filter strips* or primary Streamside Management Zones (SMZs).
- Burning on severely eroded forest soils where the average litter *duff* depth is less than one-half inch.
- Constructing water bars in firebreak lines that divert surface runoff directly into streams.

PRESCRIBED BURNING

**What about
technical
terms?**

Every technical innovation has some technical terms connected with it. While it is important to minimize the use of such terms in Stage 2 materials, any terms that would not be clear to the average reader should be defined and described in terms they can grasp. This involves two parts: defining the term and describing why it is important. For example, the term “watershed” is frequently used, but often not well defined, and its importance to the reader is almost never described. Though it is best to define/describe the term close to its first use, a glossary of such terms at the end of the document is also helpful. A long glossary is a clue that the material is too technical for readers at this stage.

Where does the reader go to learn more?

If readers are persuaded that the concept, innovation or practice might work for them, they will want more information. Either they will want specific questions answered or they will want to know what to do next. A clear where-to-go section is an important (and often absent) part of Stage 2 materials (see example 9). The best sources for more information are local and easily accessed. Next best is a central contact point that can distribute information to local requestors. The least useful is a technical authority or regulator, particularly if he or she is distant or hard to reach.

EXAMPLE 9

**DEFENSIBLE
SPACE**



Healthy Forest

...A Handbook for Fuel Reduction

APPENDIX E

Where To Get Assistance

AGENCY	CONTACT PERSON	PHONE NUMBER	SERVICES PROVIDED
California Department of Forestry and Fire Protection		(916) 823-4904	Advice on timber management and harvesting; Burning Permits.
Natural Resources Conservation Service, USDA <i>(formerly SCS)</i>	Cliff Heitz District Conservationist	(916) 823-6830	Technical advice to landowners on soils, vegetation, forest health, and wildlife habitat.
Placer County Air Pollution Control District	Ann Hobbs Air Quality Specialist/Planner	(916) 889-6868 (916) 889-7130	For Burn Day Information For Non-Residential Burning
Placer County Resource Conservation District (RCD)	Rich Gresham Manager Mark White Resource Planner	(916) 885-3046	Information on the Interagency Watershed Fuel Reduction Program for Meadow Vista. Public school and workshop program presentations.
Placer Hills Fire Protection District	Glenn Nelson Fire Marshal, Placer Hills Fire Protection District	(916) 878-0405	Organization of defensible space program; advice on defensible space concepts; enforcement of fire hazard reduction ordinances; Burn Permits; agency coordination.
University of California Cooperative Extension Placer County <i>(same as Placer County Farm and Home Advisor)</i>	Sharon K. Junge County Director Roger Ingram Farm Advisor/Pasture & Livestock Garth E. Veerkamp Farm Advisor/Extension Horticulturist	(916) 889-7385	Information and technical assistance on horticulture, livestock and pasture, natural resource management, and home environmental subjects to enhance the lives of community members.

Where did I see that?

A Stage 2 document of more than 8-10 pages could probably use an index of terms. Readers may want to keep such documents as references. If they do, an index gives them an easy way to refer back to specific material.

A Checklist for Stage 2 Documents

Start with a single theme

- Is the theme clear, concrete, and relevant to the reader?
- Does it address the reader's basic question?

Relate to the reader's perspective

- Does the document draw out implications relevant to readers at Learning Stage 2?
- Does it address readers' real concerns?

Use effective language

- Is language that relates to readers at this Learning Stage used?
- Are language triggers, that make the points easy to understand and accept, used?

Use chunking

- Is it written in a hierarchy of digestible chunks?
- Does each chunk contain no more than 5-9 pieces of information related to a single point?
- Has irrelevant information been excluded or moved to another chunk?

Integrate graphics

- Are all the diagrams, tables, pictures, and drawings integral to conveying the point?
- Do they help to tell the story?

Summarize information

- Are the points summarized in easy-to-find boxes or tables?
- Does the wording in the summary agree with the wording in the preceding material?

Limit technical detail

- Is the language free of jargon and are technical terms used sparingly?
- Are all terms that might be difficult for Stage 2 readers clearly defined?
- Is there a glossary of unfamiliar terms?

**Include
additional
sources of
information**

- Are easily accessible sources of additional information included?
- Can readers get useful answers to their questions and guidance to move forward from these sources?

**Provide easy
references**

- Is the material arranged for easy reader access and referral?
- Would an index be a helpful addition?

Considerations for Stage 3 Learners

Overview

Stage 3 readers have decided to adopt the concept, innovation or practice, at least in part. They need the knowledge of *how* to go about doing it, and the confidence to begin. The challenge for the writer at this stage is that the material must be clearly procedural while also presenting as many alternate courses of action as possible.

Both Rogers and Charvet have noted that only about 50% of the people adopt an innovation exactly as presented. The other half of the adopters use only part of it or change it to suit their own requirements. Half of the readers will need explicit step-by-step instruction while the other half will need to see alternative possibilities as well.

The Stage 3 objective

A Stage 3 document is primarily a “how-to” implementation manual. The document’s purpose is to outline the process in an overview and then to describe each step in enough detail to build confidence in the reader without overwhelming him/her. Publishers of home repair, yard care, and technical manuals have developed many techniques for accomplishing this. Examine their material for presentation ideas. Depending on the complexity of the task, tips for choosing someone else to do the work may need to be included.

Issues to address

In general, the following reader concerns will need to be addressed.

- *Do I have enough information to begin?* This includes both the requirements and the steps.
- *Is this too big for me to handle?* Is the process broken down into manageable chunks without overwhelming detail?

- *Can I do this in stages over time or must it be done all at once?*
Practices that can be broken into tasks, which can be accomplished over time, are usually more likely to be implemented.
- *Where do I get the resources (tools, manpower) to do this?* If resources are required beyond those generally available to this sort of landowner, ways to acquire them should be included.
- *What alternatives do I have?* Once the desired end result has been clearly presented, offering alternatives increases the landowner's sense of control and improves the odds of implementation. As noted above, about one-half of the adopters will re-invent the practice anyway. Unless effective alternatives are provided, they may choose unexpected or undesirable alternatives.

Some Specific Stage 3 Suggestions

What's in this section?

In this section we will again use examples from reviewed material to clarify ways to focus and present material for ease of implementation.

Start with a goal

Readers implement a practice because they see it as a way to achieve a desired future state (My faucets won't leak; my yard will look good; my house won't burn; etc.). Start by reassuring readers that this practice will assist them in achieving their desired future state. Be sure it is the reader's goal, not the writer's, that is being implemented. The text and drawing in example 10 provides just such an introduction.

EXAMPLE 10



Bulletin No. **1**
James R. Fazio, Editor

How to Prune Young Shade Trees

"As the twig is bent, so grows the tree." This insightful old bromide about children might just as well serve as the cardinal principle for pruning young shade trees. What you do to your tree in its first few years of life will affect its

shape, strength, and even its life span. In importance, early pruning must rank just after selecting the right tree for the site, and careful planting.

The sketch of the tree on the right represents what we like shade trees to look like 15 years or so after planting: a tall, straight trunk; and a full, healthy crown with strong, well-spaced branches... a tree that casts a broad expanse of sheltering shade, that resists damage by wind and ice, that is easy to maintain.

The sketch at the left also represents a 15-year-old tree. But it looks more like a big, rambling bush than a well-groomed shade tree. Its low-growing branches obscure streets, driveways, and walks, posing traffic hazards. Many branches have been damaged during storms, and weak, unsightly shoots sprout in abundance. Maintenance is badly needed and will now be expensive.

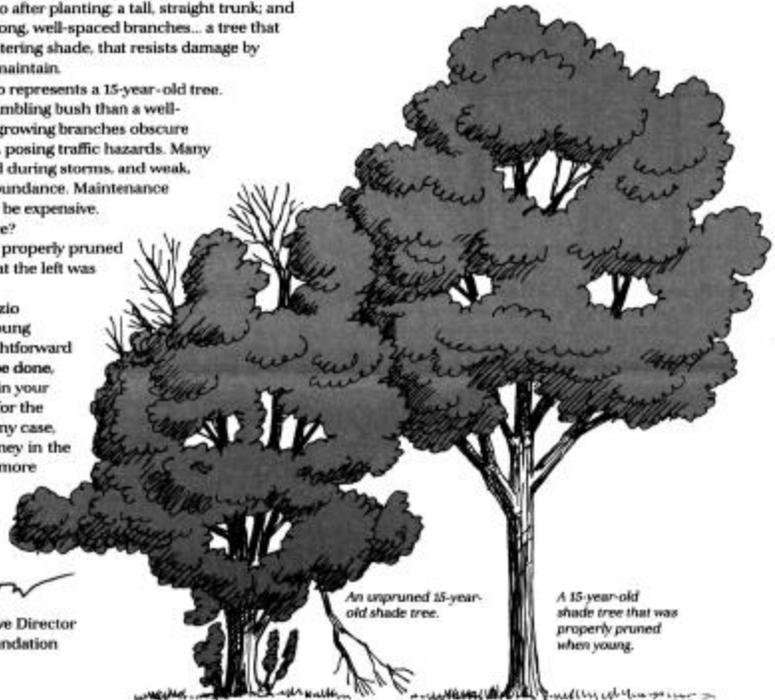
What made the difference?

The tree at the right was properly pruned when it was young. The tree at the left was neglected.

As Bulletin editor Jim Fazio skillfully explains, pruning young shade trees is a simple, straightforward task. It is a job that needs to be done, whether by you for the trees in your yard, or by your community for the trees on public property. In any case, proper pruning will save money in the long run, and give you safer, more beautiful, healthy, easy-to-maintain trees.

John Rosenow

John Rosenow, Executive Director
National Arbor Day Foundation



**Include
everything**

Think of an implementation document as a recipe for success. A good recipe includes: ingredients; tools and utensils; a detailed, illustrated, step-by-step process; and usually, a picture of the ideal result. Recipe writers must know their audience well enough to know whether they are accomplished chefs or barely able to find their way around the kitchen. The presentation will vary depending on the reader's prior knowledge.

Writers of implementation documents have the same requirements. Can the practice be done with hand tools or with heavy equipment, or both? What alternatives exist? What materials will be needed, and where could they be gotten? What skills are needed? What planning steps are required before work begins? What permits or easements are needed? What problems could occur? Where can readers go for help if they run into a problem? What tools or information is the reader likely to have already? The more carefully these questions are considered beforehand, the more likely a successful implementation will be.

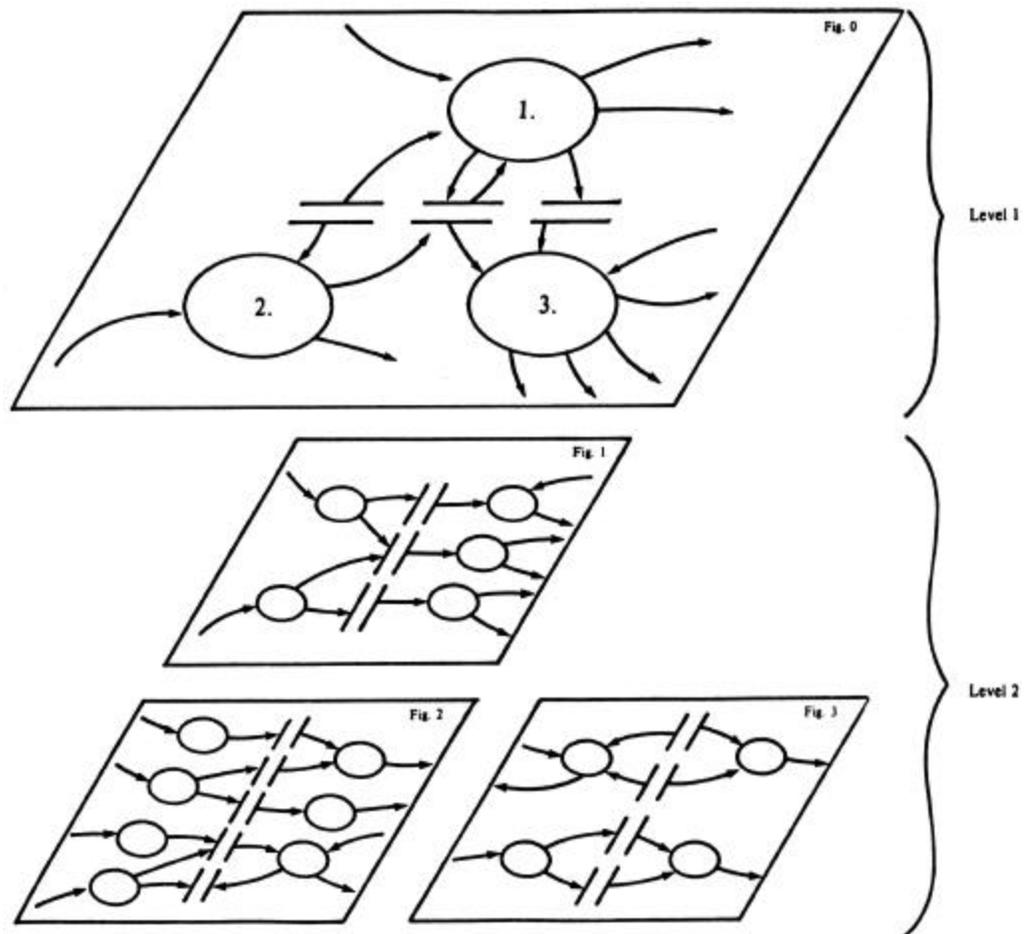
**Organize
from general
to specific**

A technique that has proven useful in describing highly technical tasks uses *conceptual levels*. Begin by listing what needs to be done at the most general conceptual level then go into more detail, much like a tree identification guide. In a wildfire defense guide, begin with the general steps: remove fuel, prune trees, use fire-resistant landscaping, remove cuttings, other preparations, etc., but leave out specific details. This becomes an overview or procedure list. At the next level, break each of these general steps down into its components and alternatives. Leave out detailed task descriptions. Then break each component into the tasks that need to be accomplished, including "how-to" details. Finally, include skills-building tips, such as how to use a chain saw or sharpen an ax, appropriate to each task.

This gives readers a sense of the whole practice without bogging them down immediately in detail. If they need detail in a specific area, they can go down the conceptual levels to get as much as they need.

Example 11 illustrates this technique. It diagrams a way of describing a complex computer system using conceptual levels. The higher level (Fig. 0) gives the overview, the next level (Fig. 1, Fig. 2, Fig. 3) describes the specific steps for each component of the higher level. Levels continue breaking out in the level below until each specific step has been described.

EXAMPLE 11

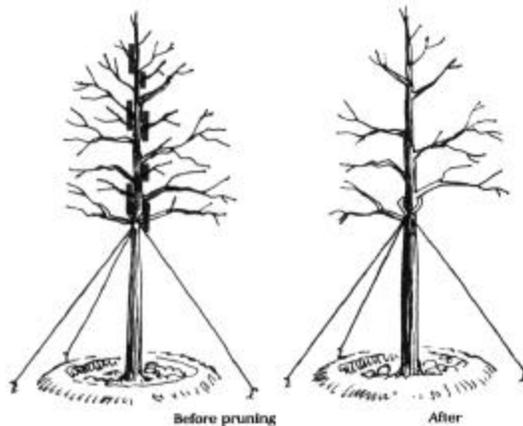


**Illustrate,
Illustrate,
Illustrate.**

Whenever possible, use a diagram, drawing or picture to convey the message and use the words to make the points clear. Example 12 uses line drawings to give the reader a clear sense of the task of pruning urban trees. The words compliment the drawings and add special messages to complete the instruction.

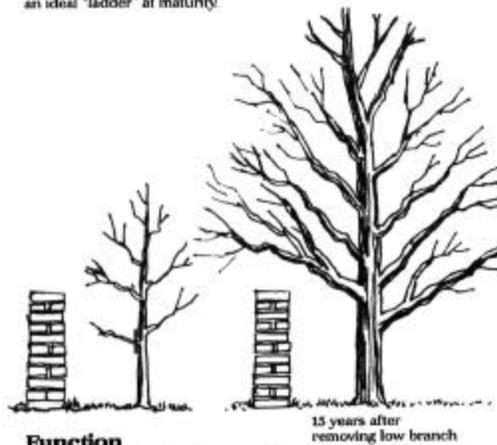
EXAMPLE 12 **Pruning for Form**

The objective in pruning for form is to help shape a tree that is aesthetically pleasing and serves well in the space it is to occupy. After pruning with strength in mind, look for ways to help shape the most desirable tree.



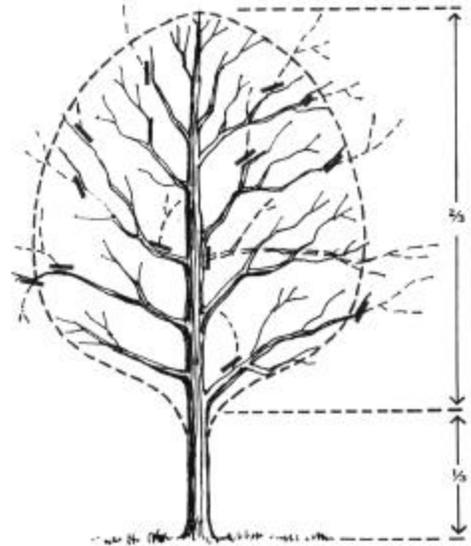
Thinning and Spacing

Most trees benefit from thinning — removing a portion of the limbs that compete for space and light. Evenly spaced laterals, 8-12 inches apart in the young tree, is a good rule of thumb to help assure an ideal "ladder" at maturity.



Function

Try to imagine what the tree will look like when it is larger: If a limb is headed toward trouble (the house, walkway, sign, etc.), remove as early as possible in the life of the tree. Closure of the wound will be more complete when the limb is small, and it is less trouble and expense. Remember: limbs do not move upward as a tree grows in height.



**Ingrowners
Protruders and Crown Ratio**

When a crown is dense, look for limbs that turn inward, and those that extend beyond the "natural" outline of the crown. Prune at the trunk or down to an appropriate lateral branch. Over-pruning can damage or even kill your tree. Always maintain at least 1/2 of the tree as the live crown.



Double Leaders

Protect the leader from competition. In trees with co-dominant leaders, remove the one with a crook or other defects, or that creates a lop-sided appearance.

Caution: Do not prune too high too quickly. To "lift" (raise) the crown, remove lower limbs over several years. No more than 1/3 of the live crown should ever be removed in a single cutting.

Using “right way - wrong way” illustrations

Sometimes it is helpful to illustrate why something should be done a certain way. Example 13 shows both what to do, what not to do, and what the results of doing the work incorrectly would be. This tends to emphasize the importance of doing the work correctly.

EXAMPLE 13

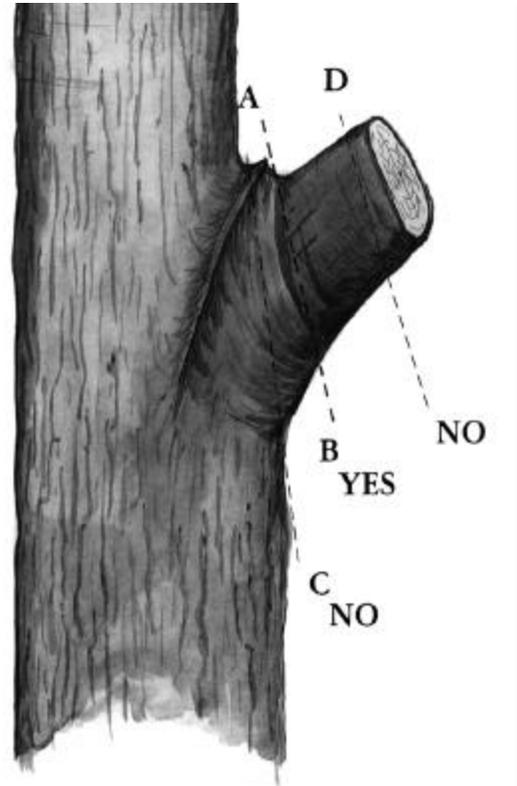
BRANCH PRUNING.

Cut living and dying branches (A) as close as possible to the branch collar (B).

- Do not remove the branch collar (C).
- Do not leave stubs (D).
- Do not paint the cuts.

Most trees can be pruned anytime, but if possible avoid pruning when leaves are forming or falling.

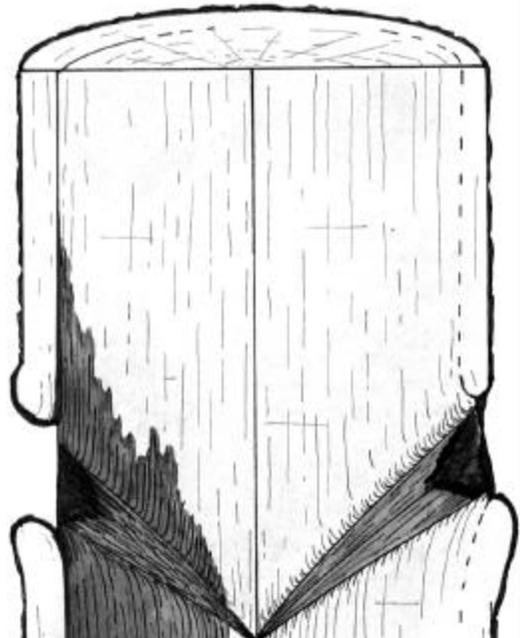
Pruning in the dormant period and after leaves mature is good.



DO NOT MAKE FLUSH CUTS!

Here is an inside view of pruning cuts that removed the collar—a flush cut—left, and a proper cut, right.

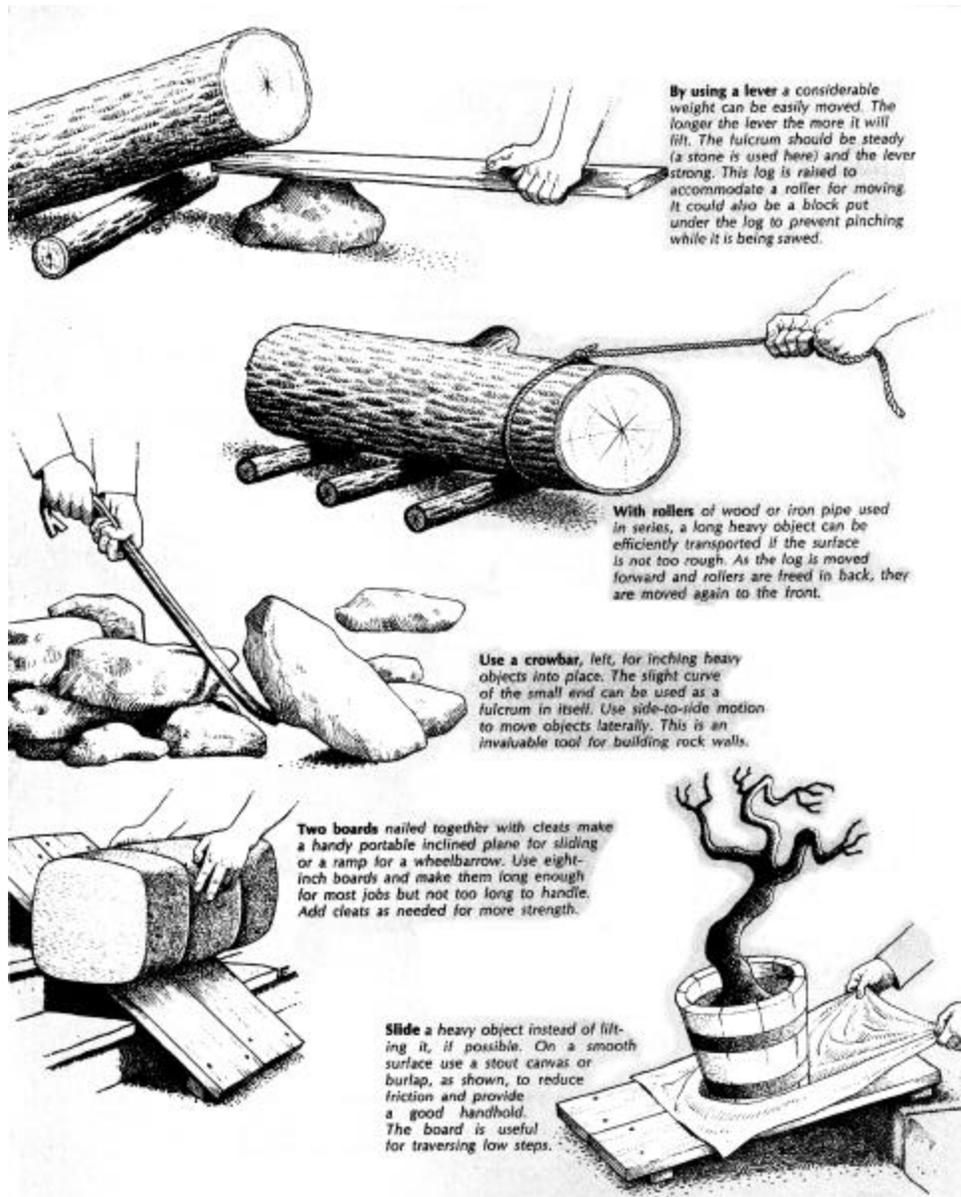
Flush cuts and wound dressings stimulate large callus that rolls inward and prevents wound closure. Flush cuts start over 14 serious tree problems!



Remember to present alternatives

At any conceptual level, there are often more ways than one to arrive at a goal. Include as many alternatives as possible. As you describe the practices, consider alternatives that could work and present all of them, even if you prefer one of them. The half of your readers who are looking for alternatives will thank you, and one of your alternatives may help to overcome a problem someone else has. Example 14 illustrates how many alternatives there are for something as simple as moving a heavy object.

EXAMPLE 14



**Leave out
extraneous
material**

In many of the documents reviewed, writers sometimes included material that had no direct bearing on the subject. Remember, the reader is here to learn how to do something. Background and history, interesting stories and odd bits of information may appeal to the writer, but they distract the reader. This is a cook book and the material is only as good as its ability to help the reader reproduce the recipe.

**Index the
steps and
terms**

If the practice is composed of several steps and if conceptual levels are used, an index which includes process steps and unfamiliar terms will provide significant benefit. Readers will find it easier to refer back to related material if they can find a reference in the index. An index is also a useful way of grouping related information that is not in close proximity in the text.

Technical terms again

Any term the average reader cannot readily understand or which might be misinterpreted should be clearly defined. A real danger for writers of Stage 3 material is assuming the reader understands terms that are commonly used by professionals. This could leave the reader dangling. One way to avoid this danger is to submit the material to typical readers and ask them to mark any terms or phrases that are unfamiliar. The material can then be edited to reduce the confusion and a glossary (such as example 15) can be added to clearly define each term or phrase.

EXAMPLE 15



Chopping - The flattening of vegetation remaining after harvest in order to concentrate it near the ground.

Clearcutting - The total removal of a merchantable tree crop from an area.

Contour - An imaginary line on the land surface that is at a constant elevation.

Culvert - A metal, concrete, or plastic pipe through which water is carried.

Designated trout waters - Water bodies specifically conducive to trout as designated by the South Carolina Department of Health and Environmental Control.

Directional felling - Felling trees so that they fall in a predetermined direction which will cause the least damage to the site.

Disking - Tilling soil to reduce competing vegetation.

Drainage structure - A man-made structure that facilitates the movement of water off an area.

Dredge material - Material unearthed when a ditch is excavated.

Drought index - A measure of soil or vegetation dryness.

Duff - The partially decayed organic matter on the forest floor.

Edge - An area where two or more vegetation types converge.

Ephemeral stream - A watercourse generally without a well-defined channel which flows only in response to rainfall or snowmelt. Ephemeral streams flow for less than 20% of the year during normal rainfall conditions.

Erosion - The detachment and transportation of soil particles.

Excessive rutting - The determination of excessive rutting is highly subjective and must be made by a licensed forester or other qualified professional experienced in local logging operations, soil types, and site conditions (see definition of *licensed forester* and *qualified professional*). The determination must consider rutting extent and depth, soil type, slope, position on slope, management prescription, and any other pertinent factors.

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Who can I ask about that?

It is unlikely that Stage 3 material will cover all the possible problems that could arise in every situation. Sometimes the reader will need detailed answers to specific questions in order to move forward. A resource list containing names, phone numbers and areas of expertise is as important here as it was in Stage 2 (see example 10). Include as many local information sources as possible.

A Checklist for Stage 3 Documents

Start with a goal

- Does this document help readers to implement their desired future state?
- Does it address their real concerns?

Include everything

- Have all the requirements and steps been included?
- Is there anything else the reader needs to know to be able to carry out the work?

Organize from general to specific

- Have conceptual levels of the process been separated for clarity and easy access?
- Is the organization of the document clear and easy to follow?

Illustrate, illustrate

- Does the process description center around graphic illustrations?
- Is the text closely tied to the illustrations?

Include alternatives

- Have alternative ways of doing the work been included?
- Do the alternatives encompass the needs of the range of possible readers?

Leave out extraneous material

- Does everything in the document help the reader achieve the desired outcome?
- Have distractions been removed?

Index the steps and terms

- Are clear references to the location of related material in the document provided?
- Is there an index?

Define unfamiliar terms

- Are unfamiliar terms clearly defined where they appear?
- Is there a glossary of unfamiliar terms?
- Has the document been field-tested for clarity?

Include a resource list

- Does the reader have access to additional sources of information?
- Are references to accessible sources of help provided?

Considerations for Stage 4

Overview

Stage 4 readers are proficient in the theories and practices, may have done them on their own property, and may have advised their neighbors. This is the Mastery Stage, where thinking in terms of new ideas and practices is second nature. These readers want to keep current with technology and increase their ability to spread the word.

Stage 4 purpose

The purpose of Stage 4 documents is to make the latest information available for the reader's use. They may take the form of: technical bulletins, newsletters, or announcements, etc., which keep readers informed and connected.

Issues to address

If the information they contain is new or contradicts established belief, the document will benefit from the considerations and suggestions for Stage 2. The reader may have to be informed and will probably have to be convinced of the value of the new information before he/she will be willing to apply it. Thus, all the Stage 2 issues will need to be addressed before the practice is described.

If the information is an enhancement to material already being used, Stage 3 considerations and suggestions can be helpful. The reader will need step-by-step practice descriptions which make implementation easy to understand.

In any case, there is the same need as in previous stages to address the reader's perspective, to use clear presentation methods, to illustrate the points, to define unfamiliar terms, and to reference sources of additional information.

Conclusion

Write to involve your readers

Interviewees and workshop participants were actively looking for material to assist them through Stage 2 and Stage 3. Addressing readers at each Stage of Learning with material oriented toward their needs, which is presented in ways that make adoption or implementation easy, will greatly increase the usefulness of the material. Writing is difficult work; make sure the effectiveness of the result is worth the effort.

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