

MAKING A PLAYBOOK

Congratulations: You finished a community engagement project!

After completing a project like this – whether it’s a listening session, an advisory board, a road trip or some kind of event – it’s tempting to breathe a sigh of relief, take a beat, and then press right on to the next thing. But before you do, we have a recommendation: Capture the details of what you did, while it’s still fresh.

A couple of reasons for this. First, we in news have notoriously short memories for processes. If this event was a success, you’ll probably want to repeat it in the future, and if you can’t remember exactly what you did to make it a success – or just as importantly, what you wanted to change for the future – you’re going to be kicking yourself. Capturing your thoughts now is a good way to make your future self’s life a little easier.

For another, our industry has a turnover problem. If one person was responsible for a huge chunk of this project, and they leave for another opportunity, they take their knowledge with them. If that knowledge isn’t recorded somewhere, it’s gone, and you’re left to reverse-engineer whatever it is they did to make the project happen. If that involves reaching out to people who only ever worked with your departing colleague, you’ll have to add “restarting a relationship” to that list, and that’s going to really bog down your timeline.

You may be wondering now: What’s the best way to capture your experience and insights of the project? Luckily, America Amplified has a guide for that. Read on, and know that Future You is breathing a sigh of relief that you’re doing them this favor.

PART I: REFLECT

America Amplified has created a 90-minute self-guided workshop to help you capture what you did for your engagement work. You can find [the template for the exercise here on Mural](#). You will need to create a guest account as well as copy the training template. Please do not edit the training template, as others will want to use it.

If you would prefer to do the exercise in person, you’ll need sticky notes and a large work surface.

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Making a Playbook: Reflect (cont.)

Our objective: Identify all the engagement related work we do and codify how we do it.

Ultimately, we want to have a usable guide to reference when we're starting an engagement-related project. This can help us come up with ideas for how to approach the project AND remind us who and what is involved in pulling it off.

Step 1: What engagement projects have we done? (20 minutes)

- First: (10 minutes) List all the engagement-related work you've done as a newsroom — everything you can think of! (individual stories, listening sessions, newsroom series, podcasts, community events ... if you did it, put it on a sticky note!)
- Then: (5 minutes) Organize them into categories and give the category a name (put all the stories in a group, events, etc.). Don't worry if there's just one sticky note in a category.
- After that: (5 minutes) Look at your categories and discuss — do we approach all of these activities or projects the same way? If not, break it down even further.
- Finally: Title each of the other areas (scroll to the right or below) with one of the categories you identified.

Step 2: How did we do it?

- For each category (35 minutes) address each of the questions below, using sticky notes:
 - Who is/was involved at the station? (Think in terms of ROLES rather than INDIVIDUALS. If Jon Snow the reporter leaves, is his replacement going to be responsible for his part of the project? Or can that part of the project be done by someone else? If so, who is that someone else?)
 - What platforms are/were involved?
 - How did/do we measure success?
 - Are there any external contacts or resources required to pull this off?

Then consider: If you were to do this project again, what would be the MOST IDEAL setup?

Ask these questions:

- Who SHOULD be involved at the station? (Give everyone a RACI designation to determine their level of involvement.)
- What platforms SHOULD be involved?
- How SHOULD we measure success?

And finally:

- What else should we note down for our future selves?

(See next stage for next steps.)



Make a Playbook: Record

PART 2: RECORD

You have the ingredients, now write the recipe. Start a document and work together to:

- Outline workflows
- Add examples of past work
- Include ideas for future iterations

Your playbook is yours to do what you like. Want a glossary of station-specific engagement terms? Go for it! A miniature Yellow Pages of contacts at partner organizations? Why not! The options are so varied, it's easy to get overwhelmed. [Here is a sample base template – the bare bones of what we think should go in an engagement playbook.](#)

- OVERVIEW → What is this document, anyway, and why did we make it?
 - Your station's definition/approach to community engagement journalism
 - Your journalism mission statement (see [this explainer from Trusting News](#))
- ACTIVITY
 - What we did → a description of the community engagement project you are capturing in this segment
 - How we know it worked → What made you want to put this project down for Future You to repeat? What made it good and worth it? This section is where you put your wins from the project, whether that's new sources or a boost in social media followers or good anecdotal feedback. Make the case right up front why the project is worth repeating. This doesn't need to be super long—a paragraph will do. Pull from the “How did we measure success?” section of your planning exercise or from your Impact Tracker. ([See more about Impact Tracking here.](#))
 - Who we need to pull this off → The people who touched this project at any level and a comprehensive list of what they did. This includes station staff, but this is also where you can put external partners if they were essential to the process.
 - Platforms used → What distribution platforms you used and what you put on them.
 - Lessons learned/future wishlist → What you want to remember when you try this again to make the process and outcome even better.

Repeat the “Activity” section for as many activities as you like!

Make a Playbook: Examples

Further reading

Here are a few examples of playbooks:

- [Sample Station Playbook 1](#)
- [Sample Station Playbook 2](#)

And a few more just for inspiration:

- Vermont Public used an “office hours” strategy for their 2024 election project: popping up in public locations across the state to talk to people about their priorities for elected officials. Brittany Patterson, executive editor at Vermont Public, created an “office hours” guide for reporters so they could jump in easily. The guide serves the same purpose as the kinds of playbooks we’re discussing here. [Check out Vermont Public’s “office hours” guide](#) for inspiration to set up your own playbook.
- [KOSU has another great example](#), put together by their community engagement expert Kateleigh Drumm.