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Chapter 6

Designing a Communications Strategy

Every day, communications strategies unfold all around us. Though we may not realize it, the billboards, radio jingles and storefronts, the countess logos and slogans and advertisements all over the internet, our daily newspapers, the TV, these are all clever prongs of wider strategies working to distinguish one item or idea from another. In this age of unparalleled choice, communications is committed above all to the principle of *broadcasting differences:* here's why our idea – in this great sea of ideas – really matters. Here's what separates our findings from all the others. Here's what makes our approach and our organization unique. And here's how our ideas can help you make a decision – whether you're choosing between two pairs of shoes or two policy options.

While it may be easier to think about communications in terms of products – a good video documentary, for example – it's more constructive to think in terms of an ongoing and iterative *process*. A communications strategy is not the glue between different communications products: it is a means of elaborating how we network, participate, and interact with the world. Good communications reflect a two-way dialogue, where we listen (what does our audience want?), design and deliver *audience-informed* strategies, and then gather feedback to assess our impact.

Every organization requires a dynamic communications strategy. While the private sector the world-over invests trillions of dollars every year on advertising – *on broadcasting their difference* – the public and non-profit sectors tend to perceive communications as an optional or fringe activity, and certainly not central to the work (e.g. the research) itself.

Communications are typically out-sourced or developed by junior personnel working with miniscule budgets and little idea of what, in the larger sense, the organization is trying to achieve.

> "While policy research and formulation are given their due as tough, demanding areas of an organization's work plan, communications is seen as 'soft'. While program development and practice are seen as requiring expertise and the thoughtful consideration of best practices, communications is an 'anyone can do it if you have to' task. It is time to retire this thinking. Doing communications strategically requires the same investment of intellect and study that these other areas of nonprofit practice have been accorded."
>
> – **The Frameworks Institute**
>
> **Source:** cited in Hershey C. 2005. *Communications Toolkit: A guide to navigating communications for the nonprofit world.* Available at: www.causecommunications.org/clients-cause.php

Clearly, the stature of communications must change: if organizations want to broadcast their difference, if they want to influence decisions, they must learn how to integrate communications from top to bottom internally, externally and across all their activities. Instead of supporting the production of random products tied to specific outputs (e.g. a paper summarizing research findings), organizations need to see communications as a vehicle that is not only helpful or required but *essential to achieving core goals*.

To that end, this chapter has been arranged around the *Essential Elements*, a series of ten steps every organization should consider as it develops a communications strategy. Addressing these gives us a precise snapshot of who we are, what we have to say to the world, who we want to influence, and how we'll do that – now, and in the months and years to come.

The Essential Elements

1. **Review**: How have we been communicating in the past? How effective has that been? How do our audiences perceive us?
2. **Objective**: What do we want our communications to achieve? Are our objectives SMART?
3. **Audience**: Who is our audience? Do we have a primary and a secondary audience? What information do they need to act upon our message?
4. **Message**: What is our message? Do we have one message for multiple audiences or multiple messages for multiple audiences?
5. **Basket**: What kinds of communications "products" best capture and deliver our messages?
6. **Channels**: What channels will we use to promote and disseminate our products?
7. **Resources**: What kind of budget do we have for this? Will this change in the future? What communications skills and hardware do we have?
8. **Timing**: What is our timeline? Would a staged strategy be the most appropriate? What special events or opportunities might arise? Does the work (or future work) of like-minded organizations or ministries, etc., present opportunities?
9. **Brand**: Are all of our communications products "on brand"? How can we ensure that we are broadcasting the right message?

10. **Feedback**: How will we know when our communications strategy is 100% successful? What will have changed? How can we assess whether we used the right tools, were on budget and on time, and had any influence?

The *Essential Elements* illustrate some core truths of communications:

- We can only communicate what we know.
- Communications is a two-way process. The better we listen to our audience, the better we'll be able to answer their needs and the more our messages will be believed, liked, and ultimately acted upon.
- Effective communicators know what an audience needs to know, what "language" they understand, and what they look at and listen to.
- Communications are the most visible single activity we engage in, requiring extra delicacy – say the wrong thing or present ourselves incorrectly and the damage could be severe and lasting.
- We should develop tools that fit the channels available for our message.
- We must develop messages that respect the cultural context of our audiences.
- We must understand and respect our communications abilities and limits, as well as our time and resources: communications can be time- and skill-intensive work.
- We must learn from our mistakes and our successes to improve our future communications.

In this chapter, we'll illustrate the *Essential Elements* through the example of a fictitious NGO called National Health = National Development (NH=ND). This NGO was discussed extensively in *Chapter Four's* discussion of *Context Mapping* – a chapter that serves as an essential complement to this one, particularly in its tools for understanding who our audiences are.

The Essential Elements

If we all took some time – an hour, say, or an afternoon – to discuss these ten elements, we would have the rudiments of a communications strategy and a greater understanding of our own position in the wider scheme of things.

NH=ND's place in the bigger picture is:

> We are a small research organization with a staff of five. We've existed for about five years and have undertaken four different research projects. We've contributed papers to a regional network and have published several in international, peer-reviewed journals. In 2006, we completed a controversial project examining the cost-effectiveness of indoor residual spraying (IRS) of DDT for malaria vector control (see *Chapter Four* for more information on this controversial project and its *Context Mapping*). A series of meetings with the Ministry of Health during 2007 revealed that the Ministry would **not** implement any stand-alone IRS programme, citing various environmental and systems concerns. However, they would "welcome" evidence that might help them situate different malaria control models and interventions within the wider health system.

Based on this demand, we are now completing a research proposal and are sketching out a communications strategy. The Ministry has declined our overtures to participate in the research project (citing insufficient human resources) and has not committed itself in any way to our work beyond its vague promise of "welcoming" our evidence. We'll need to build in a comprehensive communications and advocacy strategy to ensure our key messages reach them.

As there are several different sites in *M-------* implementing ITN and IRS programmes (through different public, private and NGO providers), our research aims to study the health system impacts of both interventions, with a particular lens on equity implications and individual access to each intervention.[1] We are certain that our findings will reveal not only the larger health system impacts but also give a nuanced picture of *who* is able to access *what* delivered by *whom*, potentially resulting in recommendations suggesting new subsidies, changes in service provision, and perhaps even the promotion of an *integrated* malaria control policy. Whatever the case, we know we'll wrap our findings into attractive, comprehensive and costed policy options and recommendations. After all, our ultimate goal is for this research to influence, challenge and even change national policy – and we know this will not be an easy task.

We know we have other audiences, a range of possible messages, and a small and already stretched budget. To make sure we address all of these variables, we need a communications strategy.

1. Review – Performance and Perception

How have we been communicating in the past? How effective has that been? How do our audiences perceive us?

An **audit** – a rigorous and structured review or assessment – can help us to assess our past communications performance and any perceptions of our organization by considering:

- the general state of communications in our organization;
- the ways our organization has communicated in the past (internally and externally);[2]
- how audiences perceive our organization.[3]

For NH=ND, we want to understand how others perceive us, knowing this will give us windows into our communication methods (e.g. if nobody knows who we are, we can assume that our previous communications efforts have been highly ineffective). We're going to devise a survey to gauge this, but first we'll think through:

- *the audience to receive this survey*. Who really knows about our past communications efforts? What audiences are we chiefly interested in reaching? And who will take the time to complete the survey? Note that we do not want to send this survey to everyone we interact with. We want to ensure the highest quality of our correspondence with our key and treasured recipients (like Ministry officials and other decision-makers) and thus may decide not to send them this survey.
- *the channel to disseminate our survey*. Should we send out an email to all our contacts? Should we use an easy but for-fee website like www.surveymonkey.com? Our

dissemination choices will shape the quality and quantity of our responses, and thus need to be closely considered.

Getting truthful answers often depends on granting respondents (both internal and external) absolute confidentiality. We're asking for opinions some may not want to deliver directly to us. To this end, a web-based survey tool could be useful. Also valuable here could be contracting an outside and independent consultant – respondents may feel more open to discuss sensitive issues with those not directly connected to the organization.

Lastly, Hershey (2005) raises the idea of a competitive analysis – judging our reputation not just in absolute terms, but in comparison with others. As she rightly observes, "A big part of the 'who are you' question is determining what makes you unique. What do you do that no one else can do? And one of the best ways to answer that crucial question is to look at how you compare with institutions that serve the same core constituency".[4] She cites the work of Tom Peters and his suggestion that every organization initiate such a competitive analysis by asking itself: who are we? (in one page, then in 25 words); how do we uniquely serve our constituents (again in one page, then in 25 words); and what are three distinct differences between our organization and our competition?

NH=ND: survey questions to assess external perceptions

1. How have you come to learn about NH=ND in the past?
2. In your opinion, what do you think is most unique about NH=ND?
3. What is NH=ND best known for?
4. What is the most compelling reason for supporting NH=ND?
5. What are strong reasons for *not* supporting NH=ND?
6. Do you find that NH=ND's papers, ideas or products stand out from those of other research organizations?
7. What could NH=ND improve about its communications?
8. Are there any other issues regarding NH=ND and its plans that you would like to comment upon?

Source: adapted from Hershey C. 2005, and [no author]. 2001. "Report on Communication Strategies and Information Technology". Mexico City, Mexico. Available at: www.wingsweb.org/download/communication_strategies.pdf

2. Objectives – Making them SMART

What do we want our communications to achieve? Are our objectives SMART?

What, ultimately, do we want from communications? All strategies must start with *an understanding of objectives*.[5] Communications can be expensive in resources and time, so the more precisely we can state our reasons for communicating, the better we'll be able to spend those precious resources.

Many research organizations might state their principal communications goal as: "In communicating our results and processes, we are seeking to influence or change X," or perhaps more generally, "We want people to understand the significance of our research". There may be a variety of "sub-reasons" for communicating but at the end of the day *influence* is typically the central goal of most research institutions.

A valuable start might be writing down this type of overarching one-sentence communications objective. "We want our communications to make our research understandable and to ultimately influence policy". This might apply to the organization as a whole or to a single project, or both.

After defining a general objective, we should create precise sub-objectives. The "SMART" acronym is useful here: all of our objectives should be –

Specific
Measurable
Attainable
Results-orientated and
Time-limited.

In the end we want to evaluate what we've done, so the SMARTer we can be, the easier it will be to ultimately assess and adjust our activities. As the World Wildlife Fund (WWF) offers [no year], examples of strong, specific, clear and measurable communications objectives could include: building awareness of a project or programme among a tightly defined audience; securing the commitment of a defined group of stakeholders to the project's aims; influencing specific policies or policymakers among key and defined aspects; and encouraging increased stakeholder participation on specific issues.[6]

NH=ND's audit revealed that it was generally trusted and accepted, though few could point to any of its actual results or any policies/ideas it had influenced. Stakeholders were aware of the organization but not necessarily any of its projects. In view of this, NH=ND to focus its communications strategy on one new research project alone. While an overarching strategy for the organization as a whole could be useful, most energy over the next few years will go into this project, and careful elaboration of this strategy now will lead to a stronger proposal, better budget, and potentially much more donor funding. Strong perception of the project will also contribute to the organization's reputation.

The general or overall objective of our communications strategy on this project could be:

> *"To influence the health system, national malaria control policies, and to raise anti-malaria awareness in communities."*

The general objective is relatively tight, but is it SMART? Here we mention a desire to influence policy *and* communities. The general objective could be "smartened" as:

> *"To change national malaria control policy by 2011."*

That is **s**pecific (it's malaria control policy, not malaria policy and not health policy). It is **m**easurable (i.e. did malaria control policy change? Note: we'll need to define what we mean by "change".). We feel is is **a**ttainable. It's certainly **r**esults-orientated. And the introduction of "2011" makes it **t**ime-limited, in line with a rational term – in this case the Ministry's scheduled 2011 creation of its next five-year Strategic Plan.

NH=ND will achieve its central objective of changing national malaria control policy by 2011 through a communications strategy that:

a) establishes NH=ND as an authoritative source on malaria control issues;
b) provides user-friendly evidence to key national and international audiences;
c) promotes NH=ND staff discussion of research processes and results with key stakeholders;
d) creates momentum towards government adoption of various evidence-informed changes in its malaria control strategy;
e) attracts international attention and endorsement, including the solidification of NH=ND as an active leader of malaria control in LMICs.

Communications Objectives in Action: The International Monetary Fund

The IMF's communications strategy is particularly useful in illustrating how communications can be used to assist an organization in realizing its core objectives. Their communication strategy seeks, above all, to "strengthen the Fund's effectiveness" – principally by "raising understanding and support among key constituencies of the Fund's mission and reform agenda; and using communication as a tool in the delivery of the Fund's operational activities". Its communications objectives aim: "to build understanding and support for the IMF's reform agenda...further integrate communications with operations, raise the impact of communication tools, and rebalance outreach efforts". Each of those areas is large but very well defined, and the remainder of its Communications Strategy elaborates upon each of these objectives.

For more, see The International Monetary Fund. 2007. "The IMF's Communication Strategy". Available at: https://www.imf.org/external/np/pp/2007/eng/052907.pdf

3. Audience – *Primary and Secondary Targets*

Who is our audience? Do we have a primary and a secondary audience? What information do they need to take action on our work?

Understanding audiences is fundamental. There may be several different "types," each with their own likes, needs and abilities. As has been stressed throughout this *Toolkit*, the better we know our audience – and what they need to understand our work – the better our chances to influence them. If we don't see them, appreciate them and listen to them, we will never reach them.

Our communications efforts hinge upon this type of understanding. For instance, we could spend time and finance in creating a video – but if our audience is, for instance, rural villagers, will they have the hardware to play it? Will they speak the language of the video? If not, can we add subtitles? And will they be able to read those? Each audience has its own needs, ranging from the intellectual (e.g. issue/research comprehension) to the cultural (e.g. images considered taboo) to the practical (e.g. owning a radio, having electricity) and the greater we understand and respect these boundaries, the likelier we are to achieve our desired impact.[7]

Beyond the many techniques for mapping audiences and stakeholders outlined in *Chapter Four's* discussion of *Context Mapping*, here we'll perform the useful exercise of dividing our audience into two: the Ministry of Health and local communities. If we revisit our specific communications objectives, we can see that there are (at least) two other audiences suggested: the national media and the international community. With the idea of serving both *primary* and *secondary targets*, we can develop appropriate messages for each.

Primary Targets

1. Ministry of Health

While of course we would love to have the Permanent Secretary or Director General read and understand (and even demand!) our results, let's take a more realistic approach. Based on our knowledge of the Ministry, we're going to focus on the Director of Research, the Director of Public Health, and also on several of the Ministry's mid-level "desk officers" responsible for working with foreign donors around malaria initiatives (Roll Back Malaria, the Global Fund, etc). We know that these "targets" have a decent understanding of both malaria and health systems, and are broadly familiar with the details of ITN and IRS approaches. **On a scale of one-to-ten, their understanding of our issue is about a seven**. We can thus prepare much of our communications for this audience in a relatively scientific fashion. Should we describe research processes or stick to straight reporting of results and policy recommendations? Should we adopt a 1:3:25 *graded- entry format* as outlined in *Chapter Eight's* discussion of the *Two-Pager*?[8]

The Graded-Entry Format

1 = a one-pager of clear and concise *take-home messages* for skimming or time-pressed decision-makers;

3 = a three-page executive summary (such as a policy brief) with more details and resources for interested decision-makers and practitioners;

25 = a twenty-five-page scientific paper or synthesis for administrators or implementors.

2. Local communities

From our work with communities during a previous malaria project, we know the needs and knowledge-base of this audience quite well. **On a scale of one-to-ten, their understanding of our issue is about a two**. We understand how diverse the term "local community" is, and how some sub-groups may have strong influence over others. As we can't possibly reach every group, we'll want to target one of those influential sub-groups. Knowing that the main challenge in reaching this audience is reducing malaria control into digestible "bites" of education (i.e. promoting prevention-savvy techniques, training of district health staff), systems (i.e. delivery mechanisms, gender analysis, equity of access) and economics (i.e. who should pay for these interventions?), we're going to focus our energy here on women's groups. When it comes to our country's local communities, we know that women are the arbiters of household decisions, especially on health issues.

Local communities are a "primary" target for several reasons. The first is that they are at the coal-face of those most affected by the disease, the interventions, *and* any national malaria control policy. The second is that they can become excellent advocates for our policy recommendations, precisely because they are the most affected and, if amplified well, have a voice that will resonate in any decision-making forum.

Secondary Targets

1. The national media

From past experience, we don't trust the national media. They've continually misrepresented our work, and they have never approached us for our opinion on national health issues. That said, we understand that the media is absolutely essential in conveying messages around social change and in stirring up policy debates. Though we recognize that television is the medium with the highest impact (especially in urban areas), we will not focus on this, though we may be fortunate enough to get an interview on a televised news programme. Instead, we're going to prepare information for the print media and radio. **On a scale of one-to-ten, their understanding of our issue is about a two.**

Note that the media may not always be a particularly helpful target. As Media Trust observes, "Everyone would like a higher media and political profile, yet activities aiming towards this may ultimately be self-serving and only communications driven, with no wider impact".[9]

2. The international community

Beyond our own international funders – who themselves are an important audience – we have few contacts in the international community. However, we do know that malaria control is a hot topic; we know that the WHO has a keen interest in new malaria research and could become a vehicle for disseminating our results. In addition to using some of the techniques outlined in *Chapter Four's* discussion of *Context Mapping*, we'll do a good web search to reveal what networks and entities are particularly active in malaria, while also active in our country or region. Then we'll figure out the national "portals" to these audiences, either through a local agent of that organization, or via global entities like the WHO, the GFATM and others. We'll also see if there are any websites, "news groups" or social networking sites we might join to promote our work (for more on this, see *Chapter Twelve's* take on *Tapping Technology*). There is often a hunger from "northern" groups to partner with strong and dynamic "southern" organizations, and we need to be savvy to this. Lastly, we'll prepare a good list of the donors in our country who are interested in malaria issues – noting that not all of these will have an interest in health systems or malaria *control* issues.

On a scale of one-to-ten, their understanding of our issue is about an eight.

4. Message – Problems, Possibilities, Policies

What is our message? Do we have one message for multiple audiences or multiple messages for multiple audiences?

While we may have only one message that we want to convey (e.g. a particular research result or recommendation), we may want to modify this message for several different audiences. It is more than likely that we will have three or four key messages, and will want to tailor them for three or four audiences using three or four different tools.

Problems ← Possibilities → Policies

As discussed in *Chapter Eight's* consideration of the *Two-Pager*, we can imagine each "message" briefly explaining the problems, the possibilities for solving those problems, and the potential policies. Another way of phrasing this is: problem – solution – action.[10] These component message "parts" should each be no longer than 35 words, and must reflect the comprehension abilities of each target audience. As with the Two-Pager, developing messages is an exercise in logic (especially in structuring the order of the messages) and brevity. If our primary target were to read our messages over breakfast or during an elevator ride, would they understand everything we want them to?

For NH=ND's project, there is one additional wrinkle. We haven't completed the research yet! Understanding that our messages will definitely change over the course of our project – likely in nuance as opposed to outright substance – we can nonetheless sketch the problems, possibilities and policies we anticipate, and qualify them as such. Importantly, we can also build time and resources into our proposal for the development of these messages. A focus group meeting or informal survey may help us get a firm hold on what our targets already understand, and what *they* perceive as the problems and possibilities. Our messages need not be "ours" alone. We can also assist targets like community groups in elaborating their own evidence-informed messages. What better way for our research to influence a target than to have the target do the hard work of communicating for us?

The message development for the Ministry of Health rests on advocacy and a comprehension of the ministry's policy formulation process (individuals and structures) and policy windows. This has already been discussed in *Chapter Eight's* discussion of the *Two-Pager* and *Chapter Two's* discussion of *Bringing in the Demand*. In considering our other primary audience of local communities, let's design a message that a) emphasizes the importance of the health systems aspects of malaria control; b) suggests solutions; and c) through this campaign works to enlist local communities as advocates of our research, hoping that they might come to pressure government to make the changes suited to their needs.

Message for Local Communities:
1. Improving malaria control is an essential issue for all of *M---------'s* communities, as malaria remains the biggest killer of children under five. When used properly, both insecticide-treated nets (ITNs) and indoor residual spraying (IRS) are strong weapons in the fight against malaria.
2. Research has shown that both interventions have a strong health systems impact, positively and negatively. A study of both interventions reveals drastically different levels of access (across geography, income levels and gender), and different levels of service and financing (from public to private to NGO providers).
3. The current national approach to malaria control is uneven and highly inequitable. Communities need to press local and national government to adopt an integrated malaria control policy that sets out fair and just mechanisms for the delivery of and access to interventions that might protect every child from this terrible scourge.

5. Basket – Tools and Products

What kinds of communications "products" will best capture and deliver our messages?

The choice of our communications "basket" depends squarely on the type and content of message to deliver, our available resources, and also – most crucially – on how the audience likes to receive information. What newspaper do they read? What radio station do they listen to? Where do they gather? How can we marry scientific content with the right dissemination channel?

After checking our budget and determining the human skills of NH=ND, we can start sketching out the kinds of items we want to place in our basket of communications.

1. Ministry of Health
A *staged approach* is often effective when promoting a scientific message, a desire for change *and* when dealing with an audience we'll need to persuade. Here we might start by disseminating one piece of information (e.g. a compelling "headline" above a one-pager of take-home messages), then progress to something more sophisticated (e.g. a three- or eight-page discussion of the main messages), and then, assuming the success of earlier stages, conclude with a convincing product (e.g. a 25-pager) that discusses the research in full detail and points to other resources. As stated, the staged approach is well captured by the 1:3:25 graded entry format, with each product matching an anticipated rise in audience interest.

> 1. *Take-Home Messages.* Exciting facts. Tone of "Believe me, there's evidence to prove this". Tempts the decision-maker to learn more.
> 3. *Main Message Discussion.* Aimed at those now "open" to the possibilities. Shows the concept is more than an idea. It is real, it stands up to scrutiny, and it's backed by authoritative experts. Persuades the decision-maker that action is required.
> 25. *The Evidence.* Shows the proof. Shows the context. Shows how policies can solve problems. Indicates other resources, and what still needs to be done. Assures the decision-maker that the time is right, the issue is pressing, and *credible* solutions are at hand.

A communications "basket," however, can go well beyond policy briefs, take-home messages and peer-reviewed papers. Especially when targeting decision-makers, we cannot discount the tremendous value of face-to-face meetings. There is no substitute for them. As we know, such meetings can take the form of phone calls, seminars, workshops, focus groups, conferences, and on. And, as discussed in *Chapter Two's* examination of *Bringing in the Demand*, we might also budget some resources for multi-stakeholder fora focused on *creating* products like a policy brief. Our research findings (and opinions) might then serve as either the backbone or as a principal input to a full national dialogue, with the end result ideally an evidence-informed policy change.

In February 2008 in Addis Ababa, Ethiopia, an EVIPNet workshop brought together seven African teams, with each composed of a senior decision-maker and researcher. In plenary and group work, each team developed a policy brief focused on how to support the use of artemisinin-based combination therapies (ACT) to treat uncomplicated falciparum malaria. Through the work of EVIPNet's Global Resource Group, country teams drew on a wealth of systematic reviews (on ACT; on delivery, financial and governance arrangements; on behaviour change) and single studies conducted in their own country or region. Following the one-week workshop, teams returned home to stage a national policy dialogue (NPD) at which the policy brief featured prominently in a discussion of key officials and stakeholders.

Within this idea rests another truth of both research and communications: no matter how well we package and communicate our research processes and findings, we alone will not change policy. We must put our message in perspective, and to do that we must listen, learn, adapt, and continually refine and re-direct our message.

2. Local Communities

We require very different tools to reach this audience. Some of the audience may be illiterate (rendering irrelevant any policy brief), and "emotional" messages demand rapid feedback and quick reflexes that only face-to-face communication can provide. First, let's organize **village-level meetings** with community leaders and women's associations to explain the health systems' issues at hand. Second, **"town-hall" meetings** and lively **posters** could be used to support or illustrate our claims. Then, as one of the centrepieces for our communications campaign, let's commission someone – an audio-visual producer perhaps, or a communications company – to create simple, direct **radio spots** that could be aired on a regular basis on community radio stations. Let's also consider putting our one-page of take-home messages (which we developed for the Ministry) in local health clinics.

All of this represents quite a number of different tools, and a serious investment of time and human resources. However, the posters, radio spots and policy briefs may also attract wider attention, either in-country or because we've sent them to various global contacts. The media can be brought into this scenario in different ways – first as direct targets of these outputs and, second, as the entity that *reports on the use* of these tools. A news report on how a community integrated IRS and ITNs that cites our cutting-edge radio spots and posters and, of course, one of our meetings, would be a communications *coup* – and a great "multiplier" of audiences.

We should also add a **newsletter** to our basket – we'll issue it twice a year, and it will contain updates on the research project for both our primary and secondary audiences. And of course, we should also consider the use of a **website** to present these tools, both as a reference "zone" and to allow opportunists the chance to discover us. We need not modify any of the above tools (posters, radio spots, newsletter) for internet use, merely upload them. More information on creating a web presence can be found in *Chapter Twelve*, as well as through any local web designer. There are also free website hosting services available, but these typically come with advertisements that may not add the right "look" for our organization's online presence.

Lastly, let's review some of the communications products we *must* create – like reports to our donors, for instance, or formal annual reports. Can we modify some of the information in these reports for a brochure, our newsletter, or even some of the text for our policy briefs? If we start thinking that *anything we produce* for communications can be used whole or in part in different ways, the more shortcuts we create and the more productive our time and resources will be. It's also worth asking a donor exactly what they want in a narrative report – would a policy brief, for instance, suffice? Could a published newspaper article take the place of a scheduled report? Donors as much as researchers are as interested in policy relevance and application of the work they support – it's up to us to proactively influence the nature of our reporting to them.

6. Channels – Promotion and Dissemination

What channels will we use to promote and disseminate our products?

Having the right message, the right audience, and the right products is one thing. Delivering them is another. All too often, researchers spend too much time on the products and not enough on the channel. This is a critical failing because the channel is every bit as important as the product itself. *The channel is essential.* The medium – be it TV, newspaper, or a meeting – dictates who receives the message. If someone must pay for a service (e.g. a newspaper), those who don't pay won't receive it. If someone must attend a meeting to receive the message, those who don't attend won't receive it.

Quite simply, our products must be seen and heard to have any value at all. What's more, they must be seen and heard *by the right people* to have any impact. And before we develop any product or tool, we must identify the right channel to reach our audiences, we must budget for it, and we must have a strategy in place for moving our product to it and through it.

For our primary audience of the Ministry, we'll personally hand-out the graded-entry format documents, as well as mailing them in hard and soft copies to all intended recipients. We'll also mount them on our website, and naturally we'll send them to all of our email contacts – perhaps after creating a mailing list (for more information on listserv's see *Chapter Twelve*). We'll also professionally print our "take-home messages" and leave them in strategic places, like waiting rooms at health clinics, a church, a health & fitness club – anywhere we feel our target audiences may go. For our more technically complex tool of the radio spot, some context mapping techniques will help us understand how content gets onto radio (e.g. do we need to pay the radio station?), and determine other important issues like the reach and listenership of each radio station. We could also make a CD-ROM or DVD of our radio spots for dissemination (at conferences, for instance – or at the Ministry), and should definitely put them on our website – international audiences love multimedia.

Most importantly, let's make no assumptions. Let's find out the key details of selected channels before developing any content. A few phone calls may well reveal that a particular product just won't work – too expensive, too limited, or just not appropriate for the channels realistically available to us.

7. Resources – *Materials, Finances, People*

What kind of budget do we have for this? Will this change in the future? What communications skills and hardware do we have?

Communications can be expensive. They require high-quality materials and methods for creating those materials; they require people with the skills to use those methods; and they require dedicated financing. We need to be realistic about what we can actually achieve, and aware of the many "hidden" costs around certain tools – as the following mock budget for radio spots shows:

Budget for 18 Radio Spots				
Item	**Number**	**Cost**	**Total Cost (USD)**	**Notes**
1. Pre-Production				
Radio spot concept (incorporating research) and creation of 6 episode scripts	10 hours	$50 per hour	$500	Writing fees to hire professional writers
Editing of script	2 hour	$50 per hour	$100	To hire outside editor
Translation of six scripts into local languages X and Y	6 scripts x 2 languages = 12 translations	$100 per script	$1,200	Languages will be: English, X and Y. The script will be the same for all languages.
Sub-Total Pre-Production Costs			**$1,800**	
2. Production Costs				
Interviews	20	$20	$400	To cover transportation fees for interviewees
Voice talent	2	$100	$200	Small honorarium for two voice-actors
Various production costs	18	$200	$3,600	Covering all technical inputs, rental of recording studio, etc.
Content Supervision and Editing			$500	Honorarium for our own staff
Technical Editing			$500	Honorarium for radio staff
Sub-Total Production Costs			**$5,200**	
Post-production Costs				
Air Time	18 spots	$100 per 10 minutes	$1,800	Each spot is 10 minutes long

CD creation: duplication of CDs (incl. master); labeling CDs, etc.	180	$2	$360	180 CDs in total: 60 per language. To be produced in-house.
Sub-Total Post-Production Costs			**$1,260**	
GRAND TOTAL			**$8,260**	

Even this type of cursory budget indicates this is an expensive proposition. Sometimes the sheer act of drawing up such a budget – and taking the time to think through all costs, as well as who will do what – can help to dictate which tools should and should not be developed.

8. Timing – Events, Opportunities, Planning

What is our timeline? Would a staged strategy be the most appropriate? What special events or opportunities might arise? Does the work (or future work) of like-minded organizations or ministries, etc., present possible dissemination opportunities?

Setting realistic deadlines in communications can be tricky – especially when we take to heart the ideas of listening, learning and adapting, and being reactive and responsive. That said, there are obvious deadlines if we want to disseminate our messages: national policy dialogues, ministerial meetings, international conferences, purchased air time, and so on. What's more, once we've aroused interest in our work, we must have the products ready to satisfy that demand.

We may opt for a "staged strategy," envisioning the build-up of our core messages (from simple to sophisticated) as a time-bound process. Baeyaert (2005) frames his vision of a staged approach through a desire not "to play all your cards at once," urging organizations to "map out who you will approach first (influencer cascade); plan for a regular flow of information rather than one-shot announcements; [and] build in 'highlight activities' with high impact".[11] Staged strategies often let audiences determine their own exposure to our research: in the graded-entry 1:3:25 formulation, reading the 1 may convince the audience to progress to the 3, and in turn to the 25. Whatever the case, once we announce ourselves and make our message heard, we need to keep ourselves known and our knowledge available.

A second timing point relates to any obvious or potential events we might capitalize on. These could be conferences bringing together key stakeholders, a change of government, the scheduled writing of a government position or strategic plan, or an anticipated policy shift. Every month of every year invariably has an event that we might hang our communications efforts on; the more "in tune" with these events we are, the better we'll be able to use them for our own purposes. It's worth tasking one of our team members to keep abreast of current and future events, an eye fixed squarely on dissemination of our products. Potential changes in government – or within the Ministry itself – are also times of great opportunity for pushing our agenda. Newcomers often want to effect a change or make a mark, and we must be ready to supply them with all the information and evidence they may need.

When it comes to global events, a key idea is to subscribe to several different listservs, which will deliver news and information on upcoming events right to our in-boxes. The pre-eminent listserv on health information and events is currently PAHO's Equity List, which sends out 3-5 emails per day, highlighting recent papers, toolkits and upcoming conferences and events (on global issues). It can be joined at: http://listserv.paho.org/Archives/equidad.html, and accepts submissions.

For NH=ND, chances are strong that we are not the only organization working on malaria issues, or even malaria research, in our country. So how can we take advantage of momentum or publicity created by like-minded organizations? What are their big events? Can we join forces? Connected to this idea is staying alert to the work of organizations that may not, on the surface, be relevant to our mandate but, if we just spin our work or focus a little bit, turn out to be superb vehicles for our agenda. For instance, a conference on Information and Communication Technologies may not be concerned with health or malaria precisely, but it may be a good place to showcase our radio spots as a cutting-edge way of disseminating research results.

9. Brand – Creating one and being on it

Are all of our communications products "on brand"? How can we ensure that we are broadcasting the right message?

Consider the logos and products of Toyota, Nike, Heinz and Barclays. These brands translate not only as car, shoes, food, and bank (what they *are*) but also give us an association of status, quality, and size (what they're *like* – the feelings their products create in us). A brand tells the world, at a glance, who and what we are. It is what we want to be seen, known and remembered as. "Being on brand" means that whatever we do, say or produce is consistent with the image and quality our brand represents. *Our brand represents everything we do.*

Before any of our products are disseminated, we must go through a checklist to ensure that our messages are of high quality and are "on brand":

- Does our message, in two sentences or less, capture the importance of our work?
- Does our product show our honesty and trustworthiness?
- Does it show, in concrete terms, what we've achieved?
- Does it frame our issue and our research within the issue's broader perspective?
- Does our message inspire? Does it convince an audience of its worth?
- Does it lead an audience to further resources?

Source: adapted from WWF. [no year]. *International Communications Department. Programme/Project Communications Strategy Template*. Available at: http://smap.ew.eea.europa.eu/test1/fol597352/International_Communications_Strategy_Template.pdf/download.

We must take "being on brand" seriously. We must be both recognizable and consistent in our communications – on the small details (e.g. using the same font and colour schemes in any print communications) and on the big details (staying true to our core messages). We communicate who we are and what our organization is every day: we must have quality safeguards in place to ensure that we broadcast the right message. Delivering the wrong or mixed message – to a Ministry official, for instance, or a donor – might deal a debilitating blow from which our organization may never recover.

Three simple "being on brand" strategies include:

1. *Creating a "communications committee" to review our messages and products before they're disseminated.* As indicated in the text box above, there are some important questions we need to ask ourselves before we release any product. The committee need not be composed entirely of our own staff members; we may find individuals from like-minded organizations (or even from a donor organization) happy to quality-check the consistency, "honesty," and perspective in our messages.

2. *Taking or providing media training.* Essential to understanding how we might remain "on brand" is understanding how the media might react to our messages, and how it might choose to report us. What is a "brand" to the media? How does the media select the stories it covers? What "issues" do they generally report? We need to ensure that everyone in our organization understands how the local/national/global media works and can reduce our work to effective, punchy and consistent sound bytes. We need to ensure that even the office manager, for instance, can speak in strong detail about our general work or any our specific projects.

3. *Hiring a professional to create a logo and a style guide.* These design issues are central to a perceived "professionalism": the more professional a brochure or newsletter looks, the more professional the issuing organization must be. Just as our personal appearance speaks to our professionalism (imagine wearing a T-shirt and shorts to a board meeting), so do the small details of design contribute to the "look and feel" of our organization.

To that end, hiring an outside firm to design both a logo (the graphic representation of our organization) and a style guide (rules governing all communication products) is sound. Of course, we can do both of these internally, but may benefit, resources permitting, from the perspective and experience of a professional. Either way, we need to ensure that the logo and style guide are easily accessible to all staff, and that everyone knows the rules concerning their use.

Tips for developing a style guide include:[12]

- Provide a description or guidelines for using our logo – when to use it, when not to use it, how to use it, whether it's in black-and-white or colour, and so on.
- Create a preferred "house style" for all print communications, setting out rules for font type, font size, capitalization, punctuation, and abbreviations.
  - e.g. "All our correspondence (e.g. formal letters) will be in Times New Roman, size 12. Text will be justified. Headings will be in bold, italics, size 14. Logo to go in top right corner".
- Choose a reference work (e.g. the Chicago Manual of Style) and the preferred dictionary to resolve any spelling or grammatical issues.
- Describe acceptable variations to the house style.
- Create a naming nomenclature for projects, programmes, and documents (especially collaborative documents)

  - e.g. "proposal-to-WHO-malaria-control-2008-v1.3" becomes, after a round of mild revision, "proposal-to-WHO-malaria-control-2008-v1.4" and "proposal-to-WHO-malaria-control-2008-v2.0" after major revision.
- Create a good glossary of terms.
- Create a list of frequently misspelled or misused words.

> For NH=ND, our 1:3:25 series of graded-entry documents all use the exact same font (same size, colour; same headings); large, colourful numbers separate the three documents (showing it is not an all-or-nothing 29-page document). Our logo appears prominently on the first page and then as a footer on every following page, side-by-side our website address and phone number (we decided that including our street address on every page was too much information). Our "communications committee" approved all of these documents before dissemination, ensuring consistency in style and format.

In addition to this, let's consider making **templates** where we can – for instance, creating computerized stationary with our logo, on which we can add any text for a quick memo or press release. A template for a newsletter would be particularly useful – instead of redesigning the newsletter from scratch each time we want to issue it, we ensure our consistency (not to mention saving all kinds of time) by filling in the template with our desired text. This also creates a sense of familiarity within our audience – at a glance they'll be able to recognize our brand.

In general: Let's be consistent. Let's keep our style and our communications as simple as we can (e.g. one font and one colour will suffice – though that does not necessarily mean black and white). Let's think about the reader's eye (through design) as much as we do their brain (through science).

10. Feedback – Evaluative Thinking

How will we know when our communications strategy is 100% successful? What will have changed? How can we assess whether we used the right tools, were on budget and on time, and had any influence?

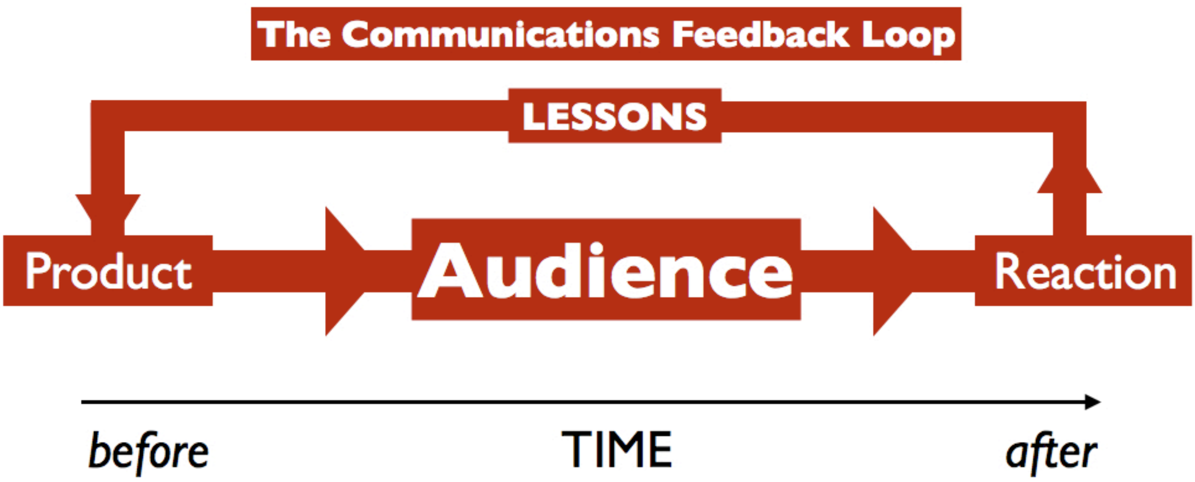
Chapter Five's investigation of *Evaluative Thinking* explores these questions in much greater detail, particularly in creating "feedback loop" mechanisms that can shed some light on what is and is not working well. This is essential information: we want to know which of our products and tools are hitting their targets, and which are missing. We want to know how our audience receives them, and how their "perception" of us might be changing. How might we change both our strategy and our products to reflect our users' views and experiences with our communications?

> Evaluative thinking (ET) is a means of *thinking*, of viewing the world: practitioners of ET take time to reflect upon their work, creating valuable lessons that can then influence and modify their activities. *What are we learning and how can we use those lessons to improve our performance?* Both the lesson and the act of learning are at the heart of ET: learn to extend what's working well and learn to fix what's working poorly.

If our resources permit it, we'll include communications – and specifically our communications strategy – in a more rigorous M&E approach. If we have external evaluators, we'll make *an assessment of our communications* one of their priorities. However, if we don't have the time, HR, or finances for this, some informal methods to gauge how well our communications are doing include:

- **Creating an Impact Log**. This is an informal record compiled in-house that gauges how our communications have been received. The log can comprise stakeholder feedback (e.g. an email extolling the virtues of our policy brief); a list of media references indicating the reach of our communications products (e.g. direct reference or citation in newspaper articles, Internet, TV); speeches citing our work, and so on. This is qualitative and non-systematic, but at the same time it can be an excellent way to gauge where we are, what we're doing well, and what we might do better. As Hovland (2007) observes, an impact log can be a good (not to mention an inexpensive and skill-light) way to chart which of our communications products is commanding the most attention.[13]
- **Conducting a Formal Survey**. With a formal survey, we should carefully and purposefully select a sample of people that could provide us with the type of information we need to reflect upon and improve our communications strategy. This might, for instance, involve polling our own staff to get an (anonymous) feel for their perceptions of our communications; we may also target members of both our primary and secondary audiences. This could tie into or build upon the communications audit we completed earlier in this chapter.
- **Conducing Key-Informant Interviews**. Like a formal survey, this is a technique to gather more in-depth information from stakeholders we feel have a particular insight into our communications. These could also be done through a focus group (which tend to work well at the community level).

There are many more ET techniques and tools in *Chapter Five*.



Source: adapted from Principia Cybernetica Web, "Feedback" http://pespmc1.vub.ac.be/feedback.html

For NH=ND, some key questions that could inform our evaluation might be: Did we use the right tools to reach the right audience? Did we achieve our ultimate goal of policy influence? How did policy shift as a result of our campaign? Did we budget adequately for our activities? Did our audiences understand our message? And, ultimately, did our communications work to change national malaria policy by the year 2011?

To gauge its communications strategy, NH=ND has decided to dedicate time and resources to creating:

- an impact log;
- a two-year progress review collecting qualitative data (key-informant interviews, formal surveys to a select list of those who've received our products before, focus group interviews);
- a Most Significant Change workshop to reflect on our communications.

Every two years, we'll create an **action-orientated learning document** that details what key lessons are emerging in communications, how we might respond to those lessons, and possible steps for incorporating them into our overall approach and every-day activities. And we'll review the essential elements as we go, and perhaps, based on the experience of designing this communications strategy for a project, we'll extend our strategizing to our entire organization.

One step at a time.

Communications Strategy Template

Here, in one page, we've reproduced the Essential Elements with some room for organizations to fill in their own answers.

1. Review: *How have we been communicating in the past?*

2. Objectives: *What do we want our communications to achieve? Are our objectives SMART?*

3. Audience: *Who is our audience? What information do they need to act upon our work?*

4. Message: *What is our message? Do we have one message for multiple audiences or multiple messages for multiple audiences?*

5. Basket: *What kinds of communications "products" will best capture and deliver our messages?*

6. Channels: *How will we promote and disseminate our products? What channels will we use?*

7. Resources: *What kind of budget do we have for this? Will this change in the future? What communications hardware and skills do we have?*

8. Timing: *What is our timeline? Would a staged strategy be the most appropriate? What special events or opportunities might arise? Does the work of like-minded organizations present possible opportunities?*

9. Brand: *Are all of our communications products "on brand"? How can we ensure that we are broadcasting the right message?*

10. Feedback: *Did our communications influence our audiences? How can we assess whether we used the right tools, were on budget and on time, and had any influence?*

Further Resources

R. Christine Hershey. 2005. *Communications Toolkit: A guide to navigating communications for the nonprofit world.*
>> This is an outstanding toolkit with many strong suggestions and examples on designing a strategy. It is available at:
http://www.causecommunications.org/clients-cause.php.

Paul Baeyaert. 2005. "Developing an External Communications Strategy". Presentation at Communicating European Research, November 14, 2005.
>> This is a powerpoint presentation with several excellent slides. It is available at: http://ec.europa.eu/research/conferences/2005/cer2005/presentations14_en.html

World Wildlife Foundation. [no year]. *International Communications Department. Programme/ Project Communications Strategy Template.*
>> Though brief, this document has done a superlative job of breaking down the many tasks within a communications strategy. It is available at:
http://smap.ew.eea.europa.eu/test1/fol597352/International_Communications_Strategy_Template.pdf/download.

Bessette, Guy. 2004. "Involving the Community: a guide to participatory development communication". International Development Research Centre.
>> This guide introduces participatory development communications concepts, discusses effective two-way approaches, and presents a methodology to plan, develop and evaluate communications strategies at a community level. It's available at:
http://www.idrc.ca/en/ev-52226-201-1-DO_TOPIC.html

Conference proceedings. "Report on Communication Strategies and Information Technology". Mexico City, Mexico. 2-4 April, 2001.
>> This lays out excellent bullet points on "best practices in internal communications" and draws very useful distinctions between internal and external communications strategies. It is available at:
http://www.wingsweb.org/download/communication_strategies.pdf

Gauthier, Jacques. 2006. "Field Sheets on effective development communication". International Development Research Centre.
>> These 14 quick-reference "field sheets" present guidelines for developing a communication strategy for rural- or village-based projects. This includes the use of "small meddia" such as photographs, illustrations, leaflets, and wokring with media specialists in theatre, radio, video, etc. Available at:
http://www.idrc.ca/en/ev-104545-201-1-DO_TOPIC.html

Media Trust. [no year]. "Developing a Communications Strategy".
>> This website has a very strong division of core tasks within a communications strategy. Though not as intricate as the Big Eleven Questions, it is very useful in thinking through needs and abilities. It is available at:
http://www.mediatrust.org/training-events/training-resources/online-guides-1/guide_developing-a-communications-strategy

The SPIN Project. 2005. "Strategic Communications Planning"
>> This brochure is a solid overview of the components needed for strategic communications, with good diagrams and suggestions. Available at:
http://www.spinproject.org/downloads/StrategicCommunications.pdf

Examples of Communications Strategies

Perhaps the best way of going about designing a strategy is to copy or modify that of others. To that end, here are some good examples of existing communications strategies:

The International Monetary Fund. 2007. "The IMF's Communication Strategy".
>> This is a superlative example, and easily one of the best available. Its value is particularly in showing how communications can help an organization achieve its core goals. It is extremely well thought out and is well worth a read. Available at:
https://www.imf.org/external/np/pp/2007/eng/052907.pdf

The Medical Research Council. 2007 (update). *Communication Strategy 2005-2010*.
>> As with the IMF's the MRC does a strong job here of laying out its strategy and imperatives. It understands its niche and audiences extremely well. Available at:
http://www.mrc.co.za/about/commstrat2007.pdf

Africa Drive Program. 2006. *Communication Strategy and Plan*.
>> This document has an excellent breakdown of the project's communication requirements as well as several tables that do a good job of demonstrating how to develop and pitch key messages. Available at:
http://www.adp.org.za/Trust_Meeting_Documents/ADP_Trust_Meeting_07_09_06/Documents/ADP_ComStrat_V0_1.doc

Comments? Questions? Criticisms?

Email the *Research Matters* Programme Officers:
Nasreen Jessani at njessani@idrc.or.ke
Graham Reid at greid@idrc.or.ke.

Research Matters (RM) is a collaboration of the International Development Research Centre (IDRC) and the Swiss Agency for Development and Cooperation (SDC). RM was launched in 2003 to examine and enhance the specific KT dynamics within the field of health systems research. From these founding connections with both a research funder and a bilateral donor, RM has occupied a unique vantage among health researchers and research-users. By working directly with both the producers of research and with its consumers, RM has developed a range of activities and modalities designed to hasten the movement of research results to the policy arena, to database and access those results, to communicate them, and to expand an appreciation of research itself. RM builds capacity among researchers to perform their own KT; RM responds to the priorities of major research-users; and RM actively brokers both research results and research processes. As an active, ground-level embodiment of KT, RM has helped to shape how health research is demanded, created, supplied, and ultimately used.

Endnotes

[1] Some details for this fictional research project was borrowed enthusiastically from Yukich Y, Tediosi F, Lengeler C. 2007. "Operations, Costs and Cost-Effectiveness of Five Insecticide-Treated Net Programs (Eritrea, Malawi, Tanzania, Togo, Senegal) and Two Indoor Residual Spraying Programs (Kwa-Zulu-Natal, Mozambique)". STI. http://www.malariafreefuture.org/news/2007/20070713_OperationsCostcosteffectiveness.pdf

[2] Some large organizations may wish to pay particular attention to internal communications perceptions, noting the sharp differences between internal and external communications.

[3] Again, the issue of internal vs. external communications is an important one. For reasons of space, this chapter will mostly focus on external communications strategies.

[4] Hershey C. 2005. *Communications Toolkit: A guide to navigating communications for the nonprofit world.* (2005). Available at: http://www.causecommunications.org/clients-cause.php.

[5] See Baeyaert P. 2005. "Developing an External Communications Strategy". Presentation at Communicating European Research, November 14, 2005. Available at: http://ec.europa.eu/research/conferences/2005/cer2005/presentations14_en.html

[6] See World Wildlife Foundation. [no year]. *International Communications Department. Programme/Project Communications Strategy Template.* Available at: http://smap.ew.eea.europa.eu/test1/fol597352/International_Communications_Strategy_Template.pdf/download.

[7] This toolkit does not explore issues of culture and communication, though this is an extremely important aspect of any communications initiative. For a strong treatment of this issue vis-à-vis health research, see Matthew Kreuter and Stephanie McClure, "The Role of Culture in Health Communication". Annual Review of Public Health. Vol. 25: 439-455. Available at: http://arjournals.annualreviews.org/doi/abs/10.1146/annurev.publhealth.25.101802.123000

[8] Lavis J, Davies H, Oxman A, Denis JL, Golden-Biddle K, Ferlie E. 2005 "Towards systematic reviews that inform health care management and policy-making". *Journal of Health Services Research & Policy.* Vol 10 Suppl 1.

[9] More from the Media Trust can be found at http://www.mediatrust.org/training-events/training-resources/online-guides-1/guide_developing-a-communications-strategy

[10] See the SPIN Project. 2005. "Strategic Communications Planning". Available at: http://www.spinproject.org/downloads/StrategicCommunications.pdf

[11] Baeyaert (2005)

[12] Adapted from Hershey (2005)

[13] Hovland I. 2007. "Making a difference: M&E of policy research". ODI Working Paper 281. Available at www.odi.org.uk/rapid/Publications/Documents/WP281.pdf