Medicines Transparency Alliance

Communications Toolkit

Contents

1. Introduction

This toolkit is designed to provide people with the information they need to help them take a planned approach to effective communications in transparency initiatives. It was originally developed for use by MeTA Countries (Secretariats, Councils, Civil Society Coalitions and stakeholder groups) and other transparency initiatives.

The toolkit is made up of 17 sections that describe how to communicate effectively with different audiences and for different purposes, with particular reference to medicines and health.

How to use the toolkit

The sections can be used as stand-alone resources but it is useful to think through the planning and/or production process before starting an activity in order to ensure effectiveness and value against investment.

The diagram below groups the sections in this toolkit according to the generic process for producing communication materials, although you may want to use them in a different order or refer to them at different stages of the process.

Figure 1: Using the toolkit

Planning and Strategy Development	How to develop a communication strategy What is advocacy? How to carry out a stakeholder analysis How to carry out a "needs assessment" Key lessons about health communication How to plan communication materials Advantages and disadvantages of communications methods
Developing and pre-testing	Strengthening listening and observation skills How to carry out focus group discussions How to commission people How to write clearly in English How to edit and proofread How to design
Distribution and promotion	How to improve media engagement How to create effective press releases How to hold a face to face meeting
Assessing effectiveness	How to monitor and evaluate use

Why communication?

Effective communication is key to the success (and the perceived success) of the country Medicines Transparency Alliances or multi-stakeholder groups. MeTA needs to ensure good internal communication within the national MeTA Councils and the broader stakeholder groups. It also needs to ensure effective communication about its aims, activities, success, achievements and learning with external audiences.

Communication is also integral to delivery of MeTA's aims and objectives as well as specific work plan activities.

What is communication?

The term *communication* covers a very broad range of activities, outputs and services all of which are important to the success of Transparency Initiatives such as the Medicines Transparency Alliance.

For instance, communication includes:

- Strategic communication, such as advocacy and political lobbying, that supports changes to the environment in which choices about behaviour are made. For instance, changes in legislation and regulation that support good practice in medicines promotion and prescriber practices.
- Internal communication within the Alliance to ensure engagement and participation of members of the various stakeholder groups. This includes interpersonal communication within the Council and other meetings, feedback from representatives to stakeholder groups, as well as formal communication materials such as minutes of council meetings and the MeTA newsletter.
- Communication activities to raise awareness about MeTA, its activities and achievements with particular audiences including the general public, for instance, road shows and media campaigns, newsletters for stakeholders, fact sheets for the general public, films, DVDs, and websites.
- Communication tools to ensure that information on medicines issues is collected and fed back into MeTA, for instance, through focus group discussions and questionnaires.
- Information and communication tools to ensure that information disclosed through MeTA is accessible and transparent e.g. the Price Observatory database in Peru and the MeTA websites.
- Communication materials designed to document and share data disclosed through MeTA. This would include MeTA activities, processes and associated learning (for instance study and survey reports, case studies, posters, lessons learned documents) for technical audiences, other medicines and transparency initiatives and development partners.
- Communication activities and events to promote discussion and learning for instance the MeTA National Forums and the workshops to review the Multistakeholder Process in MeTA.

- Work with individuals and communities to provide them with information, promote changes in attitude and develop the skills they need to ensure better health outcomes for themselves, their households and communities.

There are many useful resources that provide information or more in-depth information on specific communication activities and services as well as communication for particular objectives or audiences. Users of this toolkit are encouraged to refer to other resources mentioned at the end of each section and to the complete list provided in the section Further reading and sources.

2. How to develop a communications strategy

A communications strategy provides the overall guidance or framework for your communication work. Its starting point is the guiding operational strategy for your group, programme or organisation. An effective communications strategy helps ensure the following:

- you take a planned approach to communication (see box below) enhancing and working with the operational strategy
- you engage and communicate with your key audiences from the start
- that any communication activities and products are designed in an integrated way
- you communicate a clear brand and messages.

Box 1: Defining the strategy

Communication does not just happen. It must be organized, developed, and built. The first step in the process is to define a communications strategy.

A good communications strategy allows you to exercise better control over your work and to frame the issues in a perspective other than research. A communications strategy removes doubt, emphasizes planning, and involves all the project participants in raising the visibility of the research.

Defining the communications strategy is a task that is best carried out as a group. In addition to pooling expertise, a group approach has the even more important advantage of building on interactions between the participants.

Even a small-scale communications strategy will facilitate your work. After all, a small-scale plan is better than no plan at all and you may be able to develop and perfect it as you go along.

Source: Jacques Gautier, Putting information to work for research projects
Popularize, produce, disseminate! Reference sheets for researchers.
International Development Research Centre, 2005

How you develop your communications strategy and what it looks like will depend to some extent on the purpose, your budget and time frame. A communication strategy[1] will usually include information on objectives, audiences, messages and the timeline.

Objectives

How can communications help your organisation achieve its core objectives? Your objectives or priorities are the key to the success of your communications strategy and will ensure that it is aligned with the organisation's strategy, mission, purpose and objectives.

[1] Text for this section and the section "tools and activities" is adapted from the Media Trust website: "Developing a communications strategy www.mediatrust.org

Aligning your communications and organisational objectives will help to reinforce the importance and relevance of communications and thereby make a convincing case for properly resourced communications activities within your organisation.

Audiences

After identifying your core objectives you need to identify those audiences with whom you need to communicate to achieve these objectives. These may not always be the most obvious ones and targeting audiences such as the media may not always help achieve your objectives and can divert resources away from where they are most needed—communicating with key stakeholders.

Messages

Strategic targeting and consistency are key to your organisation's messages. Create a comprehensive case covering all the key messages and emphasise the different elements of the case for different audiences.

To maximise impact summarise the case in three key points that can be constantly repeated. Remember that communications is about storytelling: use interesting narrative, human interest stories and arresting imagery.

Timeline

You will need to give a time frame to your strategy; this is usually from three to five years but may be less for time limited programmes.

Making your communication strategy work

Once you have agreed your core communication strategy you need to identify the communication channels you want to use to deliver it based on the information you have collected about your audiences. Sometimes this plan is included as part of the communication strategy, sometimes it is developed into an operational plan. If you do include it as part of the communication strategy it will usually be an outline plan for the period of the strategy and will be supported by more detailed annual plans. Your plan will include tools and activities and resources needed.

Tools and activities

Identify the tools and activities that are most appropriate to communicating the key messages to the audiences. These will be suggested by your audiences, messages, or a combination (see box below). For example, an annual report is a useful tool in corporate communications whereas an email newsletter lends itself well to internal communications.

Audiences
What are the characteristics of the audiences you want to work with?

- age, gender, language, life experience, education and literacy level
- previous exposure to pictures
- ownership of radio/TV
- listening, watching, reading habits
- familiarity with different media, including local and traditional
- what do they know, believe and feel about the particular health issue or particular medicines?
- how open are they to new ideas?
- are there cultural norms around what type of health issues can be publicly discussed?
- where do they usually find information about health issues and the use of medicines?
- who influences them to take action or change practices or behaviour?

Objectives
Are you trying to:

- convey simple facts? share complex information? teach problem-solving skills? train in practical skills? encourage community dialogue? facilitate individual or social change? or advocate for policy change?

Resources/Constraints

- how much will different methods cost, including staff and equipment costs, and what budget do you have for the communication intervention?
- how many staff and what level of skill are involved in using the method?
- will you need trained field workers or outreach workers to implement the method?
- how much time do you have? How urgent is your time-scale?
- are there underlying political or power issues that may emerge as a result of the communication intervention? Are your communicators/facilitators trained to deal with these?

Source: Adapted from Chetley, A. et al. 2007 "How to improve the use of medicines by consumers" Geneva: World Health Organization, which is adapted from Hubley J (2004) *Communicating Health*. Oxford, Macmillan.

Resources and timescales

Think through how much your proposed tools and activities will cost, including staff and equipment costs and tailor the tools and activities to the level of time and human and financial resources available. The key rules to observe are always to deliver what you promise and never over promise. Use your resources and timescales to set legitimate levels of expectations and outline the case for more dedicated resource.

Evaluation and amendment

Consider conducting a communications audit to assess the effectiveness of your strategy with both your internal and external audiences. Use open questions with appropriate prompts and benchmarks, for instance:

- What do you read/see/hear?
- What did you understand/not understand?

- What works/doesn't work?
- What do you want to see more of?
- What information do you need that you are not currently given?
- How often do you want us to communicate with you?

If possible, get someone independent to do the work. Consider and discuss the results carefully and use them to amend your strategy.

Box 3: Developing a communications strategy [2]	
Who?	What **audience**(s) are we trying to reach? What do we know about them and their understanding, their information needs and their preferences? What secondary audiences are we also trying to reach?
Why?	What **purpose** do we have in mind? What are we trying to achieve? What do we want the audience(s) to do? What are our objectives?
What?	What information or messages – what **content** – do we want to convey in order to achieve our objectives and to motivate and mobilise the audience(s)?
How?	What communication channels or **media** will be most effective in doing this? What combination of channels will work best?
When?	What critical **timing** is involved? Are there key windows of opportunity? Are there key dates by which something needs to happen?
Where?	In what **settings** will our communication be used? Do we need to adapt our approach for different settings?
What's happening?	Is the communication working? Is it achieving what we hoped it would? What **feedback** are we getting from our audience(s)? How can we improve the feedback to ensure that the communication is working?

[2] Adapted from Developing a Communications Strategy, Knowledge and Research on Disability www.disabilitykar.net/rtf/Dev-comm-strategy.rtf

3. What is advocacy?

Advocacy has many different definitions and also takes many different forms. This can explain why it is often so difficult to separate out advocacy actions. Here is a wide definition of advocacy:

"Advocacy by an individual or by a group normally aims to influence public-policy and resource allocation decisions within political, economic, and social systems and institutions; it may be motivated from moral, ethical or faith principles or simply to protect an asset of interest. Advocacy can include many activities that a person or organization undertakes including media campaigns, public speaking, commissioning and publishing research or a poll." [3]

There is also a specific definition of advocacy that happens in a development context:

> "In a development context, advocacy is the deliberate process of influencing those who make policy. Advocacy can concern the creation, reform, implementation and enforcement of policies. A 'policy' is 'any principle or action adopted or proposed by a government, party, business or individual etc'. This includes government legislation but can be much wider."
>
> VSO Definition of Advocacy
> 'A process that tackles disadvantage by working with communities and key stakeholders to bring about changes in policy, process, practice, and attitudes in order to ensure communities' rights are recognised and realised. The aim is to actively support disadvantaged people to influence the decisions that affect their rights and lives.'
>
> Participatory Advocacy: A toolkit for staff, volunteers and partners; VSO November 2009

Developing advocacy alongside a communications strategy

One of the central ideas about advocacy is having a very clear idea or goal about what you might want to achieve, whether this is about a changing a policy, or influencing decisions made by a group of people that are involved in your area.

This makes an advocacy strategy different from a communications strategy – generally, a communications strategy will look at how an organisation wants to implement its business strategy, so that every element (from fundraising, through to policy, through to activity) is supported by the communications strategy. Advocacy concentrates on an outcome that needs changing.

In the same way that "communications" is a very wide term that is used to describe many different activities, advocacy is similar. There are many activities that can contribute towards a successful advocacy strategy, for example, lobbying and campaigning. There are different ways of conducting advocacy – the table and explanation below show some different

[3] Taken from Wikipedia: http://en.wikipedia.org/wiki/Advocacy

approaches. There are some very good toolkits about advocacy on the internet – these are listed in the section: Further reading and sources.

Three approaches to advocacy [4]

It might be appropriate to use a mixture of the three approaches to advocacy at different times throughout the process. Development organisations that support the principles of participation and empowerment should aim to see the poor undertake advocacy themselves and become agents of change in their local area. However, due to risk or lack of skills and knowledge, advocacy for others may be the only option at the start.

Table of advocacy approaches

APPROACH TO ADVOCACY	ADVOCACY *FOR* THOSE AFFECTED BY A SITUATION	ADVOCACY *WITH* THOSE AFFECTED BY A SITUATION	ADVOCACY *BY* THOSE AFFECTED BY A SITUATION
Advocacy work done by	Professionals, NGOs, church leaders	A mixture of professionals, NGOs and local community groups	Local community, workers
Main objectives for intervention	Change in law, policy or practice	Increased access to decision-making Change in law, policy or practice Build advocacy capacity of those affected by situation	Increase in awareness of advocacy possibilities and capacity to do advocacy
Characteristics	Issues often identified by outsiders Usually targeted at official decision-makers	Issues identified by community Shared planning, resources and action Outside organisers mobilise capacity	Issues identified by community Learning by involvement May have significant outside input at start
Advantages	Quick access to decisionmakers Good access to information about wider context	Increase access of poor to decision-makers Advocacy skills and capacity developed	Empowering – poor see themselves as agents of change Sustainable Can correct power imbalance
Disadvantages	Could strengthen existing power structures May not increase the capacity of local groups to act	NGO often in control and sets agenda Slower due to need for agreement between all parties	Access to fewer resources and information Risk of revenge Policy change may take longer

[4] This entire section is taken from the Advocacy Toolkit, Understanding Advocacy, Tearfund: http://tilz.tearfund.org/Publications/ROOTS/Advocacy+toolkit.htm

4. How to carry out a stakeholder analysis

A stakeholder analysis helps you think through who has something to gain or lose from your project or activities - and how you need to engage with them. "By engaging the right people in the right way in your project, you can make a big difference to its success." [5]

Information gathered through a stakeholder analysis can help inform your communication strategy. Carrying out a stakeholder analysis will help provide information on whom your stakeholders are and their priorities, the role they can play in the project, their relative importance in it, their networks and any intermediaries between them.

Understanding who your stakeholders are will help you engage and communicate with them effectively especially when the stakeholder analysis is linked to an audience information needs assessment (see: How to carry out a "needs assessment")

The benefits of using a stakeholder-based approach are that:

- You can use the opinions of the most powerful stakeholders to shape your projects at an early stage. Not only does this make it more likely that they will support you, their input can also improve the quality of your project.
- Gaining support from powerful stakeholders can help you to win more resources – this makes it more likely that your projects will be successful.
- By communicating with stakeholders early and often, you can ensure that they know what you are doing and fully understand the benefits of your project – this means they can support you actively when necessary.
- You can anticipate what people's reaction to your project may be, and build into your plan the actions that will win people's support.

Source: Stakeholder Analysis, Mind Tools Ltd, 1995-2010, http://www.mindtools.com

Outline of the process

One way to carry out a stakeholder analysis is through a workshop. This approach is outlined clearly in the DFID guidance note.[6] However you approach the analysis, the basic steps are the same:

1. **Clarify what you want to achieve.** This may be an overarching goal – for instance, improving access to medicines for poor people – or a specific objective such as promoting uptake of a technical innovation or achieving a policy change.

   Once you have done this exercise and before you go on to identify your stakeholders, you may want to share a completed stakeholder table. This might look something like table 1 below [7] or the grid in table 1) so that people understand what they are expected to produce at the end of the analysis.

[5] Stakeholder Analysis, Mind Tools Ltd, 1995-2010, http://www.mindtools.com

[6] DFID guidance note on how to do Stakeholder analysis www.dfid.gov.uk/FOI/tools/chapter_02.htm

[7] Adapted from DFID guidance note as above.

Table 1: Stakeholders

Stakeholder	Interest in project/activity	Positive or negative?
Patient/customer	Increased availability of medicines and reduced cost	+
Local manufacturer	Increased consumer confidence in quality, removal of advantages to international imports, more sales	+
Health workers	Increased availability and quality	+
Multinational pharmaceutical company	Increased competition from local suppliers and generics	-
Government officials	Increased positive health outcomes Increased accountability to other stakeholders	+ -

2. **Identify your stakeholders** (organisations, groups, departments, structures, networks or individuals who may be negatively or positively affected by an activity).

   A usual way to do this is through a brainstorming exercise with a small group of people (around six to eight) who together are representative of the range of approaches or perspectives you think are needed to identify all stakeholders (see table 2).

   For instance, in the Medicines Transparency Alliance this may include someone from a civil society organisation involved in health and/or medicines issues, from a local medicines manufacturer and a local retailer, from a multinational pharmaceutical company operating in country, a researcher, an academic, a representative from local government, from a country development partner and the media.

Table 2: Identify your stakeholders [8]

Private Sector stakeholders	Public sector stakeholders	Civil society stakeholders
Corporations and businesses Business associations Professional bodies Individual business Leaders Financial institutions	Ministers and advisors (executive) Civil servants and departments (bureaucracy) Elected representatives (legislature) Courts (judiciary) Political parties Local government / councils Military Quangos and commissions International bodies (World Bank, UN)	Media Churches / religions Schools and Universities Social and advocacy groups Trade unions National NGOs International NGOs Local people

There is no need to prioritise the stakeholders at this stage. You might end up with one list, rather than a grouped list as in table 2 above; this is fine.

If you are doing this exercise in a workshop setting:

- draw a blank template (shown in table 1) on a flip chart – one for each group

[8] Start, D. and Hovland, I. 2004. Tools for Policy Impact: A Handbook for Researchers London: ODI, http://www.odi.org.uk/resources/odi-publications/toolkits/rapid-policy-impact.pdf

- divide participants into small groups of 4-6 and give each group about one hour to list the main stakeholders
- give participants sticky paper notes (or small pieces of paper and tape) and ask them to write down one stakeholder on each note.
- ask participants to place the notes in the first column of the table
- once all the notes have been arranged in the table, get each group to select up to 10 main stakeholders and to complete the other columns (again using the notes);
- When each group has completed the table ask each group to present its findings to the others.
- This can be followed by a discussion to identify common ground and differences of opinion. It may be possible to agree on a single table; if not, the facilitator should suggest that each group nominate one person to produce a single stakeholder table.[9]

3. **Identify the influence and importance of each.** This can be done using the grid below. At the end of step 1 above, you may have a long list of stakeholders, this exercise will help you to identify which of these are key stakeholders and which are primary and secondary stakeholders. The grid organises the stakeholders in different matrices according to their power over your work and their interest in your work.

Importance/Influence Matrix

High Importance/ Low Influence	High Importance / High Influence
A	**B**
C	**D**
Low Importance / Low Influence	Low Importance / High Influence

- **High importance, high influence people:** these are the people you must fully engage with, and make the greatest efforts to satisfy.
- **High importance, low influence people:** put enough work in with these people to keep them satisfied, but not so much that they become bored with your message.
- **Low importance, high influence people:** keep these people adequately informed, and talk to them to ensure that no major issues are arising. These people can often be very helpful with the detail of your project.
- **Low importance, low influence peopl**e: again, monitor these people, but do not contact them with excessive communication.[10]

4. Understand your stakeholders

Once you have defined your stakeholders, you will want to understand their needs.

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[9] Source: DFID guidance note, as above

[10] Grid and text from Stakeholder Analysis, Mind Tools Ltd, as above.

Key questions that can help you understand your stakeholders: [11]

- What financial or emotional interest do they have in the outcome of your work? Is it positive or negative?
- What motivates them most of all?
- What information do they want from you?
- How do they want to receive information from you? What is the best way of communicating your message to them?
- What is their current opinion of your work? Is it based on good information?
- Who influences their opinions generally, and who influences their opinion of you? Do some of these influencers therefore become important stakeholders in their own right?
- If they are not likely to be positive, what will win them around to support your project?
- If you don't think you will be able to win them around, how will you manage their opposition?
- Who else might be influenced by their opinions? Do these people become stakeholders in their own right?

Ideally you will want to undertake an audience information needs assessment (see: How to carry out a "needs assessment") to find out more information about their information and communication needs and to inform the development of your communication strategy.

[11] Source: Stakeholder Analysis, Mind Tools Ltd as above.

5. How to carry out a "needs assessment"

Once you have defined your stakeholders through a stakeholder analysis you will need to understand their needs in order to design an effective communication strategy and associated products and services.

An audience information needs assessment is specifically designed to provide information on the audiences you want to communicate with and on their information and communication needs. Sometimes these questions are added on to the end of a stakeholder analysis; sometimes a separate needs assessment is carried out.

Getting started - deciding the format

Before you start, see if there are any existing sources of information on your audience's information needs, for instance readers' surveys or blog discussions. Then decide the most appropriate method for collecting the information you need for instance:

- through a short questionnaire or interview
- through focus group discussions (see: How to carry out a focus group discussion)

Because of time and cost factors a questionnaire is often the easiest approach to a needs assessment. It can be posted on a website, emailed to representative stakeholders, or included as a hard copy in a publication that already goes to your audience. You may want to consider what incentive you can provide to encourage people to fill in or return the forms.

Remember to keep the questionnaire user-friendly. Avoid including too many questions and keep the questions clear and easy to answer. You might want to test it out on colleagues or a friend before you send it out.

If you are involved in a large or extended activity (for instance a five-year funded programme) it can be a good idea to use a questionnaire to get a larger number of responses but to complement this with 10 - 20 more detailed interviews with key stakeholders. (Literature about Information Surveys or Information Needs Assessments recommends surveying 1-10% of the total population - you will have to define "total population" e.g. total number of health workers in a province, all pharmacists in a town, or the total population of a specific geographic location). [12]

Decide the questions

In designing your questionnaire or interview questions, think about how to find out, for example:

- What knowledge and information they need
    - what topics do they want to know about?
    - what do they want to know about the programme or activity you are involved in?

[12] Identifying Corporate Information Needs, Dow Jones InfoPro Resource Center. www.factiva.com/infopro/resources/Unit1FAQ.doc

- Why they want it/how they want to use it?
    - will they use it in their work? will it inform their behaviour or activities? will it inform the decisions they make and policies they help develop?
- How they want to receive it
    - can they currently find this knowledge and information? If so, where? from colleagues or friends, from the radio or newsletters, from journals, from conferences or events, from the Internet or from printed or electronic publications?
    - what are their preferred sources and why? For instance, do they have a favourite journal or website and if so what do they like about them? Ask for details of these resources so that you can look these sources up and use them to inform the development of your communication products
    - do they have any sources that they use but do not like and if so what don't they like about them? How might they be improved?
    - how regularly do they want to receive this knowledge and information?
- What knowledge and information do they have that they want to share and how do they want to share it?
    - for instance, are they involved in research or project activities that they would like to tell other stakeholders about? are they involved in new legislation or policy development that they would like others to be aware of? Do they have issues or concerns that they would like to voice directly to policy and decision makers or service providers?
- What other suggestions do they have about how you can effectively engage and communicate with them?

Remember to use language that your audience is familiar with and be clear when you are developing the questions how the results will be analysed. For instance, if you have a large survey, how do you anticipate grouping answers to open questions? Provide your respondents with information as to how the information will be used, when the results of the assessment are expected and where it will be possible to find these. Make sure you thank everyone for their time.

Timing

The exact timing for the whole process will depend on a number of factors including:

- the urgency of the exercise, including what activities are dependent on the information and what their timing is
- the method used
- people's availability (e.g. for interviews).

You will need to allow time to plan and distribute the questionnaire, a period of at least 2 weeks for people to respond to the questionnaire and you may need to send out a reminder to people. You will also need to allow time to analyse the results. This can also take up to two weeks.

Follow up

Once you have the results of your analysis, you can use this information together with the information from your stakeholder analysis to start to design your communication strategy (see: How to develop a communications strategy).

Where you can, try to thank all your respondents, for instance by sending them a personalised email or posting them a general note on the website. Once your results are available, where possible, make a summary of the findings available in an easily accessible place e.g. a programme website.

6. Key lessons about health communication

The following points outline key lessons learned about communicating health issues.

1. Communicating with people about health issues is more effective when you can talk about feelings and ideas as well as facts

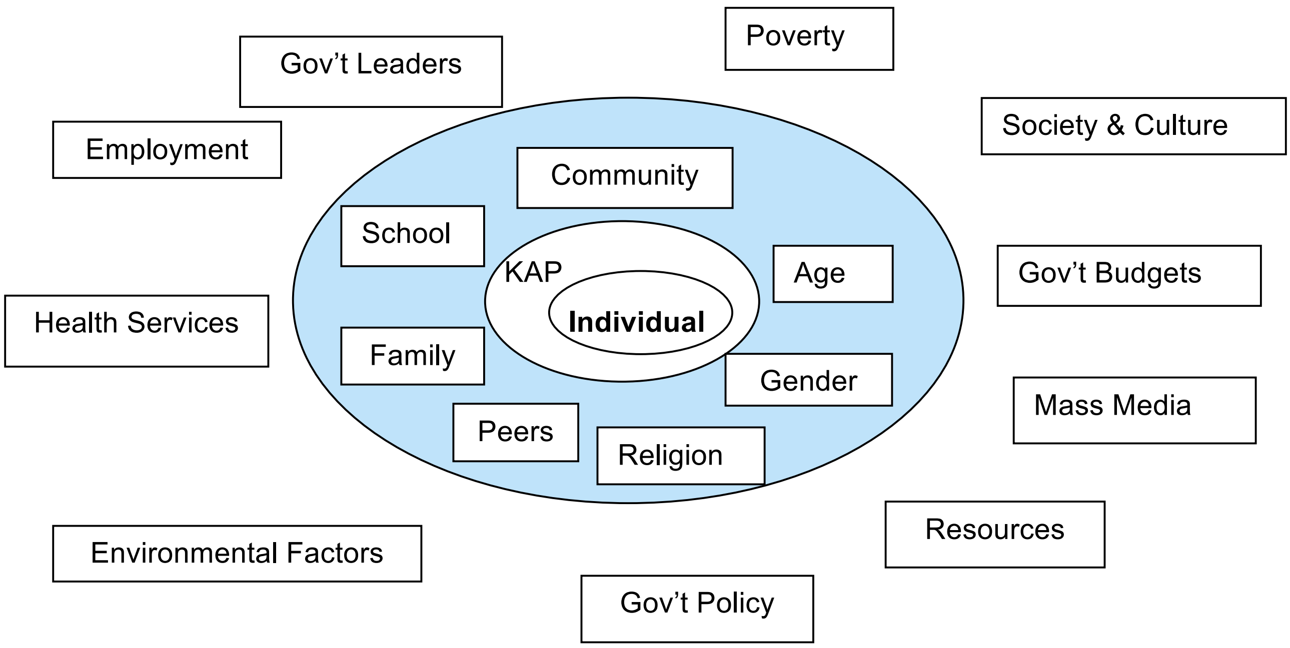
Open and warm communication from person to person and to groups is important and could take account of:

- How people feel – what are their experiences so far?
- What do they already know (and believe) about the issue you want to communicate?
- Their self-esteem – do they feel they can make a difference to themselves and others?
- Do they feel included and have control over their decision and will it have social approval?
- Do they have the means to change? This might be financial or situational.

Behaviour change is more likely to take place in individuals and groups if you remember that people already have thoughts, feels and beliefs about whatever issue you are dealing with. You must talk about these, otherwise any new information you give will not be helpful. This is often called KAP – knowledge, attitudes and practice: what do people already know, what views and feelings do they have and what do they do.

2. Communicating about health and well-being will be more effective when it relates to the social context of the person or group to whom you are communicating

The process of making and maintaining a life change is always made within the context of family, peers, the community and many socio-cultural factors. Here are some of the factors you may consider:



3. The most effective health communication and behaviour change strategies always target the communication messages to specific groups

Health workers will not relate to the same messages as the general public, similarly older people will not relate to the same message as younger ones and men and women may need different messages. Communications should target those with the greatest potential for positive change, with the greatest need and those with the greatest potential for influencing change amongst peers in their community.

4.Tailored communication is more effective than general messages

You must ensure that the information you give closely meets the needs of the target group to ensure improved communication outcomes. In many countries increasing health inequalities, especially among the vulnerable, points to an urgent need to improve communication approaches with different target groups.

5. Messages about health and the healthy use of medicines are very important

The table below sets out the *context* in which choices are made about the use of medicines. There are many examples of mis-use and over-use of medicines.

INFLUENCE	FACTORS
Family/household	Perceived need for medicines Ideas about efficacy and safety Uncertainty about the illness (resulting in poly-pharmacy) Cost of medicines Literacy levels The perceived power of medicines Local health beliefs Treating symptoms, not disease Influence of traditional healers Ideas and power of older generation
Community	Drug use culture Medicine supply system Information channels Availability of drug shops
Health service institution	Extent to which health workers are consulted Quality of health worker training and information Quality of health worker prescribing Quality of the consultation Quality of the dispensing process Reliable supply Cost of medicines
National	Implementation of essential drugs policy Drug regulation Drug legislation Drug promotion Financing and reimbursement Consumer advocacy The media Public education
International	Health consequences of global trade agreements Donor support for essential medicines programmes Global consumer advocacy The Internet

6. A combination of the effectiveness of interpersonal communication (IPC) and the reach of mass media communication is needed to change individual, group and population behaviour

Both types of communication are important and interrelated. Interpersonal communication is powerful and effective and communication by peers (similar age/gender/special interest) may be more effective than communication from health workers. Multi-media programmes linking mass media and IPC have strong impact. The mass media can reach large numbers with convincing messages, it can provide information and influence behaviour. Increasingly people rely on the media for information, through television and the internet.

7. Interactive communication is more effective than one-way information dissemination

Passive dissemination of health messages is the least effective. Messages from experts about people's needs to change their behaviour may also be disempowering. Research shows that when people are involved in the design and dissemination of health communication, the outcomes are more likely to be successful. Even a simple leaflet can be interactive – asking questions of the reader who can add their score and then read messages and advice tailored to their special needs. Drawings and photos must relate to the target groups – people must recognise themselves and their friends.

It would be helpful for any material produced to be tested by the target group to see if the messages are understood and achievable.

8. Health messages must be benefit linked

Messages about medicines as well as lifestyle issues related to health should always stress a benefit and be action oriented. Here are some examples and there is space for you to write some of your own:

✖	✓
AIDS kills	Stop AIDS - Use a condom every time you have sex
Smoking is harmful	Stop smoking and prolong your life. Start today!
Take your medicine regularly	Take your medicine three times each day at regular intervals to make it more effective and easier to digest
Use your seatbelt	
Cut down on fatty food	

7. How to plan communications materials

Vast sums of money are spent every year on producing communication materials (print, electronic and audio-visual) such as newsletters, publications and DVDs on a wide range of topics related to medicines and to general health. Most of us have been in offices where there are boxes of materials that have grown out of date before they have ever been distributed.

Resources are not always effective, largely because the producers have not spent enough time in the planning and research phase. They may have gone ahead and produced the material without thinking through all the resource implications. For instance, they may have ordered a large print run because the difference in cost between a small and large print run can be relatively small, but then they may have not allowed enough money to distribute the larger quantity.

Or they may have produced materials, based on assumptions, which may later prove to be false. For instance, they may have printed materials in English, when the target audience prefers material in national or local languages or they prefer to get their information through face-to-face communication (see:

How to monitor and evaluate). Or they may have produced materials which have content which is not relevant or appropriate to the audience concerned (for instance audio-visual material in English for a rural audience who use local languages, or which does not use local names or terminology).

Carrying out a stakeholder analysis and an audience information needs assessment will help ensure that you have correct information on which to base your decisions regarding the target audience and what you need to effectively communicate with your target audience (see: How to carry out a stakeholder analysis).

It is important to remember that communication materials on their own are rarely effective at changing behaviour or influencing policy. Evidence shows that combining different communication approaches is the most effective way of communicating (see: Key lessons about health communication). Therefore you may want to plan an activity or activities to support the communication material you produce.

Planning

If you are reading this you may already have an idea about what kind of resource you want to produce and why. Before you start production, you will want to check that your assumptions are correct and that you have the information you need to design, produce – and distribute – an effective resource. There are several different steps to think through.

One way to help ensure that you have thought through the steps to production and the questions associated with them is to fill in a creative brief before you start production (see example creative brief template below).

Planning checklist - Who, What, Why?

First you need to make sure that you are clear about why you are producing something, who it is for and how they will use it. The kind of questions you will want to think through include:

- ✓ What problem or issue is this resource designed to solve or address?
- ✓ Who do you need to reach to address this (who is your target audience)?
- ✓ Have you checked what other resources are out there that already address this problem or issue and tailored your resource accordingly?
- ✓ What do you know about your audience? What information do they want, how do they prefer to get their information (channels and format), what resources do they currently use that they like?
- ✓ What are the key messages or information that you want to communicate?
- ✓ How do you intend the target audience to use this resource?
- ✓ Are there other activities or resources (for instance skills training) that will help ensure uptake of information or knowledge gained through this resource?

You may decide to undertake producing promotional materials and all promotional materials should answer the question "How can this help the situation?" It will help to prepare a written summary of about 500 words describing the resource, to be distributed as widely as possible. This will be a useful memory aid for your colleagues, when describing the material to other people.

You need to be very clear about the distinct and added value of the resource. What does it do that is new? What gap does it fill? Why should people pay attention to it? How do you know it is necessary and of a high quality? To ensure that the organisation presents a consistent line on these issues, staff will need to understand and feel comfortable speaking about them.

You will need to have evidence to support your assumptions, Have you carried out a stakeholder analysis? or an audience information needs assessment? Have you carried out a review of existing literature or other communication materials? Do you need to carry out a focus group discussion, or questionnaire exercise and interviews?

Once you are confident that you have enough evidence to support your assumptions you can move on to planning the design and content of the resource.

Planning checklist - Design and Content

- ✓ What formats will you use e.g. written material or audio-visual material or poster be as specific using your creative brief as a guide.
- ✓ What language will you use and what language style (e.g. 'youth' slang, technical language)
- ✓ How will you illustrate it if at all? E.g. one photo per chapter
- ✓ Does your proposed format and style agree with what you know about your audiences' preferences?

Planning checklist - Production

- ✓ Who is managing the whole production process?
- ✓ Who is responsible for each of the individual tasks, such as design, pre-testing, proof reading, translation if necessary, liaison with printers and so on?

- ✓ Do you need to obtain permission or approval from anyone before producing materials, for example, permission to reproduce illustrations, logos or particular content?
- ✓ Have you prepared appropriate briefs for any work being done externally (see section 8: How to Commission)? Who is best placed to develop any briefs needed, and to follow up on them to ensure instructions are understood, and followed?
- ✓ Can you produce the materials yourself, or do you need to contract a design and/or print company to do the work?
- ✓ How will you select a printer? Have you obtained quotations and samples of work from more than one printer?

Planning checklist - Pre-testing

Will it be possible for you to pre-test the resource with representatives of your target audience before final production?

- ✓ What will be the best way to pre-test it given your audience, the type of resource, your timeline and budget? For instance, do you want to use a peer review process, questionnaire or focus group discussion?

Planning checklist – promotion and distribution

- ✓ How do you plan to promote the resource? For instance, will you use flyers, posters, popular media? Are electronic media – websites, email or electronic discussion forums possible? Can you tap into existing or scheduled opportunities, for example health worker assemblies, women's group meetings, clinics?
- ✓ Will there be a public launch event?
- ✓ When will promotion occur? Think carefully both about the timing of any launch and the date on which you release promotional material. If you can, take advantage of wider local, national or international events. Distribute posters and material slightly in advance of a launch (this might be anywhere from one week to about one month before, depending on the situation).
- ✓ Which organisations should you contact about the resource? Which government departments, institutions, civil society organisations, private sector organisations should you inform about the launch of the resource?
- ✓ How will you check that the resource is reaching the people and organisations it is
- ✓ supposed to reach?

Planning checklist- evaluating effectiveness or impact

- ✓ How will you evaluate the effectiveness of your resource? (see:
- ✓ How to monitor and evaluate)

Planning checklist- budgeting

- ✓ Have you budgeted time and resources for all these activities?
- ✓ Have you collected quotes from 3 or more suppliers where you plan to use external suppliers (e.g. printer)?
- ✓ Have you allowed for a contingency budget in case some things cost more than planned?

Some organisations request that staff fill in a creative brief before spending against any communication material is authorised. Below is an example creative brief template for publications. Section 8: How to commission shows example briefs for use in commissioning, these will contain some of the core information on the publication – for instance, title and aims and objectives - as shown in the full creative brief.

Example Creative brief template for publications	
Date	Completed by
Title of publication	
Aims and Objectives? What need will it meet? How can we meet this need? How are we going to manage and deliver it?	
What impact/s do we want to achieve? e.g. regular reporting on programme successes and challenges to a broad programme audience How will we measure this impact?	
Who is the target audience? e.g. general public and pharmacists What do we know about the circumstances, expectations and needs of the target audience? Eg a mixture of print and electronic formats will be needed	
Format Electronic e.g. JPEG file or PDF	
Print Print run Choice/type/weight of paper	
Editorial Length e.g. 1000 - 1500 words Language e.g. English, Arabic Tone of voice/style e.g. Friendly tone; clear, simple English. Technical terms should be spelled out in full. Acronyms should be avoided.	

Design and print
Paper size No of pages No of columns Font Printed single or double sided Body text colour Number of ink colours, eg black and one other colour or full colour Frequency of photos and illustrations: e,g. Minimum one photo or illustration per case study

8. Advantages and disadvantages of communications methods

Method	**Example**	**Advantages**	**Disadvantages**

Mass media	Television	• Broad reach • Can use entertainment to convey key ideas • Cost per person reached can be low • Can reach low literate audiences • Combines visual images with spoken word • Can influence behaviours that are not deeply entrenched	• Television ownership may be restricted to higher-income, urban population • High initial production cost • Difficult to meet needs of specific groups Lack of immediate feedback • Needs electricity access
	Radio	• Very broad reach • Regional radio provides opportunity to broadcast in local languages • Easy to include content from interviews/music recorded in local communities	• Similar problems as TV: difficulty making content specific to different local communities and to obtain feedback • Lacks a visual dimension • Radio sets often controlled by men
Mass media/Print	Newspapers, posters, leaflets, manuals	• Reach can be broad • Can be distributed to highly targeted group and influential persons • Can include pictures • Can provide background or detailed information	• Written material unsuitable for non-literate communities • Reach of newspapers may be limited • Some print materials may have limited distribution
Folk media/ (face-to-face)	Using folk media, theatre, songs, dance in community settings, for example bars, road-sides, markets and public places	• Takes activities to the community and is therefore good for difficult-to-reach groups • Allows for a focus on the audience's special needs • Can stimulate interaction and discussion • Can be very effective in influencing beliefs, attitudes and behaviours, providing specific skills and generating empowerment	• Field staff may not be available or appropriately trained • Takes longer to reach the audience • Performances may be interpreted differently in different settings
Face to face	Individual or small groups Eg: patient education, schools, workplace training	• Can be tailored to the audience's specific needs • Can be very effective in influencing beliefs, attitudes and behaviours, providing specific skills and generating empowerment • Can be delivered efficiently • Stimulates dialogue • Encourages teachers to learn	• Only reaches those people who use services (but through them can reach family members and neighbours) • Formal setting can inhibit the use of participatory methods • Time may be limited because of work pressure
	Large groups Public meetings, folk media	• Capable of generating a large amount of interest • Can lead to community participation	• Without advance preparation and follow up may not lead to lasting change • Depends on skilful facilitation

9. Strengthening listening and observation skills

Skills and expertise in listening and observation are often seen as 'common sense' and therefore neglected. Becoming more aware of your skills in this area and how you can strengthen them further can really help you, for instance when interviewing people as part of the stakeholder analysis (see: How to carry out a stakeholder analysis).

Listening

How well do you or your colleagues listen? Ask yourselves the following questions:

- Are there parts of conversations that you miss because you make assumptions about the speaker, for instance as a result of their age, gender, ethnic, cultural or religious background?
    - Or because you make assumptions based on their appearance, accent, education or professional background?
    - Or because you have already have formed an opinion and therefore are not really open to hearing what is being said?
    - Or because you disagree with the speaker - you think their beliefs and opinions differ from your own?
- Are you too tired or too distracted to listen actively?

Exercises to develop your listening skill and ability
Role play

The aim of the role-play example that follows is to practise and learn more about your own listening and observation skills. You need 30–45 minutes for this exercise. Three people are needed for the exercise.

The speaker and listener sit facing each other. Agree on a time limit of 5–10 minutes during which the speaker will talk about something important to them, as naturally as possible. The content should be something to which the listener can relate and respond.

The observer sits nearby (but not intrusively), listening and noting down any observations about strengths and weaknesses in terms of their listening skills that the listener displays, including any non-verbal communication (such as nodding, smiling, yawning).

Afterwards the observer shares what they saw and noted down. Did any behaviour seem rude? Did the listener appear bored? Did they really listen? Did they pick up on any issues and seek clarification or request more detail? Did they respond appropriately to any sensitive issues that came up?

Following this, the speaker shares how well they felt they were listened to and what they noted about the interaction. Then the listener shares anything they found difficult or anything they noticed about their own behaviour.

Rotate roles until all three people have taken a turn playing each role.

Discuss how it felt to play each role. What did you notice and what can you learn from the exercise to improve your work and relationships with colleagues, community members and other stakeholder groups?

Together with colleagues, consider the following:

Identify all the factors you can think of that can have an impact (positively and negatively) on communication between members of your Council staff from your organisation or sector and those from other stakeholder groups.

- What could you do to strengthen those factors that have a positive impact on communication?
- What could you do to lessen the impact of those that are negative?
- What are the implications for you as listeners and observers?

Reflecting on past practice, and this exercise, what can you learn in terms of improving your communication behaviour?

Observation

Observation skills are important for many aspects of communications and other work. Observation is particularly important if you are facilitating a group, or if you are responsible for documenting the process (note-taking).

About 80 per cent of communication is non-verbal. When you work with people from different cultural and social backgrounds (professionally and geographically) issues of language and interpretation are key and observation skills can be particularly important.

In such instances, it is important to record non-verbal behaviour and any signs as to how such behaviour might be interpreted.

Keen observation can guide and inform your practice. For example, in an interview situation, observation tells you a lot about how comfortable and at ease an interviewee is (which will have a direct impact on the quality, depth and honesty of his or her responses). In multi-stakeholder groups, Focus Group Discussions, and community work settings observation will draw attention to who is or is not present, and who is or is not participating, who is taking up a lot of the space by talking a lot, and who is keeping silent.

10. How to carry out a focus group discussion

Focus group discussions (FGDs) are structured group interviews or guided discussions used to gather in-depth qualitative information through exploring knowledge, beliefs, concerns and attitudes. They usually involve one or two facilitators and a note taker and last between 1 and 1.5 hours.

A popular research tool, they can encourage participants to generate and explore their own questions and analyse their own experiences. This can provide valuable insights into local language, concepts and understandings and into group norms and cultural values. This information can inform the development of communication strategies and approaches as well as the content and development of communication resources. FGDs are also useful for pre-testing resources and as part of an evaluation exercise.

Other advantages of FGDs

- They generate a lot of information quickly
- FGDs prompt thoughts and sometimes debate among group members, which you miss in one-to-one interviews and questionnaires
- Because the discussion is flexible, you often discover opinions and attitudes that would not emerge in a formal questionnaire
- The group can provide a 'cover' under which certain individuals might feel safer expressing their opinions
- FGDs can illuminate and explore significant differences (of understanding, belief, attitudes and practice) as well as similarities within the group
- FGDs can be valuable learning experiences for participants, for example, if any inaccurate information is shared, you can discuss this in the session
- Focus groups are often good fun!

Challenges and difficulties of FGDs

- The quality of information gathered through the FGD is affected by the skills and ability of the facilitator and note taker
- Strong facilitation skills and an awareness of how to manage group dynamics is necessary —for instance how to control vocal group members and encourage quieter group members into the discussion
- Focus groups can paint a picture of what is socially acceptable in a community, rather than what actually happens or is believed
- FGDs can be inhibiting when exploring personal and sensitive issues.

In order to be effective FGDs need careful planning and preparation.

Choosing time and place

It is important to create an atmosphere that will encourage people to talk freely and openly about their opinions and experience.

- Choose a meeting place that is easy for people to get to and which has plenty of space in case people want to get up and walk around during the course of the discussion.

- Make the space comfortable, try and seat people in a circle if possible with somewhere for the note taker to sit outside of the circle.

- Consult intended participants about, and inform, them of the date, place and time of the meeting as early as possible, and try to arrange transport or child care if necessary. See if there are any opportunities when participants will already be meeting.

Planning participation

- Think carefully about the make-up of the group. If you think about the information you need, this should help you identify who should participate in the FGDs.

- Seven to 10 people is a good size for an FGD. You may need to invite a few extra people in case some people do not turn up.

- Ensure that members of the FGD are representative of those you are interested in. For example, if you are trying to find out how medicines are used in communities, you may need to include men and women, young and old, health or community workers, and shop keepers.

- People are more likely to talk freely and share experiences if they feel they have things in common with other participants. You may need to hold FGDs with different groups if participants are unlikely to participate freely within the same group, for instance traditional healers and health workers. This is especially true of sensitive issues.

- Joint sessions involving participants from different FGDs can be organised later if appropriate.

Planning your questions

Draw up a question schedule to inform the FGD. The issue to be discussed, how much you already know about it, how sensitive an area it is and whether you can make any assumptions about relevant knowledge and beliefs, will help determine how structured or unstructured the discussion will be.

- Usually five or six questions are enough (each should inspire rich discussion and adequate time needs to be allocated for this) but you may want more (see example Focus Group Discussion protocol).

- Make sure that the questions use appropriate language for your participants and that they are clear.

- Avoid direct, personal questions. It is better to ask about what people think friends or other community members believe, or how they might behave, as this is less threatening.

- Be selective about the types of questions you ask. Closed questions will give short answers -'How many medicines do you use?' Open-ended questions will give longer, more thoughtful responses -'What medicines have you heard about that are useful for pain relief?' In general, open questions are more appropriate in FGDs.

- Avoid leading questions such as “Why do you think there are no drugs in your health centre?”

- Order the questions – begin with simpler, non-controversial questions to make people feel at ease and open up.

- If you can, try out the schedule before the actual FGD. For instance, pass questions around colleagues for comment, or try out questions on members of the target group. This will help identify, for instance, questions that might be too sensitive or confusing.

- Adapt the schedule and your FGD facilitation on the basis of this pre-test. In particular, check that all the questions are clear, relevant and will produce useful information.

Briefing the note taker

It is important to identify a good note taker to document the discussion. This allows the facilitator to focus on facilitation and ensures that no significant information is lost. The note taker should not interrupt the discussion unless absolutely necessary.

- Check any equipment, such as a tape recorder, before the FGD starts.

- Have plenty of paper with margins: note key discussion points on the page itself and non-verbal communication and the tone of the discussion in the margins alongside the key points. Highlight important things, things said with emotion, and so on.

- Use two different coloured pens, one to note the discussion itself and one to capture non-verbal communication.

- Record the group profile: age, gender, work, background etc of participants. This will help identify if a particular 'group', for instance, young women have not turned up so that you can try and find out if there is any particular reason why and if you need to try and meet with them separately.

- Capture what was said and expressed (verbally and non-verbally), by whom, the tone of the discussion (particularly over sensitive or controversial issues)

- It is generally important to note down who is coming up with what information, who was actively participating, who was not and factors that might explain any reactions, behaviour or attitudes.

Facilitation

The issue for discussion will influence how to facilitate the session and how much depth participants can go into. It is the faciltator's role to make participants feel safe and comfortable, to encourage discussion and guide the discussion to keep it focused around the information needed. The facilitator should:

- Introduce them and explain the aim of the discussion.

- Explain how the session is being recorded (usually in writing and on tape).

- Explain why and who will have access to this information and how the information will be used. This includes keeping expectations regarding outcomes of the FGD realistic.

- Agree ground rules with the group. This is especially important if the issues being discussed might be considered sensitive and/or confidential. The following group rules may be appropriate:
    - respect each other's contributions
    - keep focused
    - keep it confidential
    - get closure on questions

- Reassure participants that all their contributions are valuable and important that there are no ‘right’ answers, and that differences in the group are fine, even welcomed.

- Set the context to open up the discussion. For example, “We are all interested in improving access to medicines….” Use your previously developed guide to focus the discussion.

- Encourage group members to respond to questions and talk as openly as possible. Try to give everyone the opportunity to speak. Remember the facilitator’s role is one of active listener, and prompting the conversation. You should not be actively involved in the discussion except to guide it, keep it focused and ensure that all participants speak and a few do not dominate.

- After each question has been answered, reflect back a brief summary of what you heard as the main points. The note-taker might assist here.

- Do not be afraid of silence. A pause often gives people a chance to reflect and it can encourage quieter people to come forward and share their thoughts.

- Actively probe when you want more information or if you feel others (quieter group members) may have something to contribute to this point but have not yet done so.

After the Focus Group Discussion

- If you used a tape recorder, check that it is clear and has worked properly and make sure that no sensitive material is left lying around. This includes tapes.
- Immediately write up notes on how the discussion went, the mood of the discussion, points of confusion/anger/sensitivity, and so on.
- Check that the note-taker captured what you felt was important, including any non-verbal communication and issues.
- The notes should be treated in confidence and filed with this in mind.
- Was any information unexpected or particularly surprising? If so, why?
- Do the notes reveal anything about group dynamics or power differentials within the group?
- Do you have the information you needed? For instance, can you make revisions to the draft publication or poster or your intervention design based on this information or will you need to check things raised in the FGD further?
- Make sure that you give some feedback to the people who attended and who helped with organising the FGD.

Example from a community-based FGD conducted in the Philippines

The following guide for discussion with mothers of small children was used in a community drug use study in the Philippines. The researchers used Focus Group Discussions to elicit the mothers’ ideas about medicines. These ideas were used in the development of educational materials. To encourage a lively discussion, the moderator starts the discussion with a sorting game. Twelve popular medications (herbal and pharmaceutical) are put on a table and the participants are asked to sort the medications into piles. (The popular medications have been elicited from key informant interviews done prior to the focus group discussions). The recorder notes the comments made during the sorting.

1. The respondents are asked why medications have been grouped together and in what way they differ from other medications.

11. How to commission suppliers

When producing communication materials, an organisation often needs to contract or commission people with expert knowledge and skills such as writers, designers and editors (referred to here as ‘suppliers’ or ‘creative person’).

1. Identifying skills gaps

First, you need to identify what assistance you think you will need to produce the material. A useful place to start is by going through each section of the creative brief for the material which you have produced and thinking through the stages of production, what you can do within your organisation ‘in-house’ and what additional skills you will need to ‘buy-in’ or commission (see: How to plan communications materials). Questions you need to consider include:

- Does it need a writer with technical knowledge of the subject area?
- Do you have someone who can edit the text?
- Is the layout simple and straightforward or do you need to commission a designer or desk top publisher

- Do you need artwork – for instance for a poster or booklet?
- Will you need to carry out some kind of research and so do you need an interviewer or facilitator?

2. Selecting the appropriate supplier

Do you already know whom you would like to use? If this is someone you have already worked with? If you are confident with their work, it is not a large job, and there is no requirement within your organisation to consider more than one candidate, you can proceed with the next step of the process as show below.

For larger jobs, aim to identify a minimum of three potential suppliers and ask them to submit examples of previous work, references, and fee rate; this will help with your selection.

Sometimes organisations that use a significant number of suppliers keep a database of suppliers (or preferred suppliers) that you can refer to. If not, you can ask people in your or colleagues' networks to recommend people. Or if you have seen a similar resource that is of high quality, and you think that the author or designer may be able to assist you, you can try and contact them directly. Depending on where you work, local suppliers may have their own websites and you can identify them through the Internet.

Clarify the criteria you will use to select the best consultant for the work. For instance, how will you compare different examples of artwork? Some criteria may be very specific to the piece of work being commissioned but others, such as years of experience, or evidence of having produced similar work may be more general. You may want around five or six criteria to ensure that the process for selection is as focused and transparent as possible.

3. Draw up a consultant's brief

Commissioning someone will take time and cost money. People like designers are usually paid on a daily rate. Therefore, it is important to be as clear as you can be about what you want them to deliver, by when, and to what budget. This forms their brief.

A creative person's brief is the basic contract between them and you. If you make changes to this brief, you will need to put this in writing and there may be an additional charge for any extra work involved.

Many problems that occur in developing information and communication materials result from a failure to properly brief those involved. The supplier will usually be happy to work with you to clarify the details of the brief as they will know how to approach certain tasks and how long they will take and it is in their interests that you get the initial brief as correct as possible.

The main project creative brief should form the basis of the suppliers' brief as this will give information on target audience, purpose, and aims of the material. However the specific information provided will differ according to the type of services you are commissioning. An example of the kind of information to include in a design brief and the kind of information to include in a writer's brief are shown in the boxes below.

Example Designer's brief

Completed by: **Date:**

Example writer's brief

Completed by: **Date:**

1. **Title of publication** Newsletter for x
2. **Background information** This newsletter is released quarterly and supplements other information, such as the website and annual report. It appears on the website as well as a PDF. It should be accessible and informative.
3. **Aims and objectives** To keep stakeholders and audiences up to date with x's current work and achievements, as well as providing them with new developments, contacts in the field and an ability to contact x
4. **Target audience** x's audience is made up of health workers and educators worldwide.
5. **Language style** simple, clear informative English, with any technical or medical terms explained. English will be a third/fourth language in most cases.
6. **Content** You may wish to look on the www.medicinestransparency.org website for examples of a newsletter. The general content in this case is an introductory welcome from the Executive Director, then a news section, a more in-depth section, forthcoming events and a section about how to contact the writers. Each newsletter will be different, depending on what information you wish to convey.
7. **Length** The final copy for a one-page article in the newsletter is usually between 500 to 700 words of text (one page of double-line spaced type contains about 200 words), depending on the number and size of illustrations and text boxes. Please prepare c. 800 words to allow for editorial cuts.
8. **Illustrations** Include photographs or a line drawing for the article. Examples of any other material relevant to the article are also useful, as they can be photographed or scanned for publication. Give a brief description (caption) of material with the names of the artist or photographer and the people photographed (make sure you have their permission). Photographs should be sent as high-resolution 'jpeg', 'tif' or 'eps' files on CD, zip disk or as

It is important that the person you are commissioning clearly understands what you are trying to achieve from the project. He or she will need to know the target audience for your communication material and why you are producing it. They will need to know something about your organisation and the background to the project to give them a sense of the values and principles that are important to your organisation. Any evidence you have collected around audience needs and preferences would be very useful, also if you have any information of similar materials that you like —and why, or similar materials that you do not like and why you do not like them.

4. Contracting

If you have identified your preferred supplier and they are interested and available for the work, you will need to agree the number of days, fee rate and delivery date. For larger projects you may want to break down the components and agree delivery dates for the different components.

You will need to have an idea of what the budget you have available for this work is before you begin negotiations. Find out what kind of fee rates people are asking for this type of work. For instance, if you have interviewed three suppliers what fee rates were the other suppliers asking for? Once you have finalised the brief with the supplier, agreed delivery date, number of days needed and fee rate the project manager and the supplier need to sign the brief.

You may wish to prepare a separate contract outlining services, number of days, fee rate and delivery date and attach the brief to this contract. Having a contract separate to the supplier's brief allows you to include clauses that refer to general expectations of suppliers, for instance, that they are treated as freelance consultants and are responsible for paying their tax and (where appropriate) national insurance.

5. Monitoring progress

You will need to allow time to manage, support and stay in regular contact with suppliers, to monitor their progress, respond to any queries and work with them to ensure that deadlines, as laid out in the brief, are kept. If, for any reason, a deadline cannot be kept this should be acknowledged in advance in writing and a new deadline set.

6. Nurture professional relationships and contacts

Treat consultants with respect and keep in touch if you are pleased with their work. Remember, you may need their services again. If you receive any feedback on work they have done, pass it on to them. Make sure that any payment agreed is paid promptly and that people feel that their services have been appreciated.

12. How to write clearly (in English)

When you are writing material you need to know about your subject and the people you are writing for. You will develop your writing skills through practice. You also need to develop the ability to look at your work through someone else’s eyes. Things that are clear to one person may not be clear to others. This is why it always helps to pre-test any material you produce

Although there is no set of ‘rules’ that will ensure that everything you write is clear, following the principles below will help.

1. Keep things simple and sentences short

Use short simple phrases whenever possible. For example, write, “is it possible?” rather than, “do you think it would be possible?” If you need to use longer phrases and sentences, ask yourself if you are really sure of what you want to say. If you make your ideas clear, you will be able to express them more simply.

As a general rule, sentences should be no longer than 20 words. In many situations it is better to write two short sentences than one long one. For example:

Even families from low-income groups who cannot get easy access to medicines in their local health facilities, sell their property or livestock to purchase expensive medicines from private shops or the market, often without knowing which medicines they really need and whether they are of good quality.

can be rewritten as:

When medicines are not available at public health facilities, many low-income families sell *their property to buy them on the private market. Often the medicines are expensive, may not be the ones they most need, and their quality may not be guaranteed.*

2. Avoid jargon, unfamiliar words and 'official' terms

Jargon is specialised language only understood by a particular group of people, such as the members of a particular profession. Medical jargon is common in the health field. It is best to avoid words that you think are jargon, and instead **use everyday words** that most people are familiar with and understand. For example:

Aspirin is indicated as an effective, mild analgesic in patients able to tolerate potential gastrointestinal disturbances.

Could be expressed as:

Choose aspirin to treat mild pain in patients without stomach problems.

If you need to use a word that you think is unfamiliar to people, make sure you explain what it means as simply as possible when you first use it. Using examples can help people understand new terms.

Spell out acronyms when you use them the first time in a publication, with the shortened version following in brackets. Do not assume that people will know what an acronym stands for, even if you consider it to be in common use. For example, write: "An official from the World Health Organization (WHO) provided advice." Then, further on in the same document, you can simply use "WHO".

3. Make sure the meaning of words is clear

If you use a pronoun like "she" "he" or "it" (that is, instead of a noun like "Sally" or "medicine") make sure it is clear whom or what is being referred to.

4. Do not assume gender

Unless the subject is obviously male or female, do not assume either. If it is not appropriate to use just "he" or "she" then you could use "she/he" or "him/her".

5. Using active and passive sentences

Active sentences can make stronger statements than passive sentences, by placing the emphasis at the beginning of the sentence. They are good for news stories in particular. Sentences are passive when the subject does not perform the action, but rather has something done "to" them, or is the result of an action. Passive sentences make the point less powerful and more subtle, and can be useful particularly when you are dealing with a sensitive subject.

An example of passive language:

There were a large number of outdated medicines on the shelves in the health centre storeroom.

Active language is clearer and more convincing:

Outdated medicines filled the shelves of the health centre storeroom.

6. Keep the order logical and clear

When writing about something with a clear sequence (for example a life story, an incident or instructions), keep things in the correct order. Use numbers, letters or bullet points where appropriate. For example:

Put antiseptic on and around the wound after shaving off any hair around the wound and washing the wound with soap and water

is clearer if written as three bullet or numbered points:

(i) Shave off any hair around the wound
(ii) Wash the wound with soap and water
(iii) Put antiseptic on and around the wound

7. Concentrate on and highlight key points

Don't try to include everything you know, as too much information causes confusion and distracts readers from key points. Keep in mind exactly what your reader needs to know that will get your message across effectively.

Putting text inside boxes, into another font or in **bold** or *italics* also makes it easier for the reader.

8. Avoid unnecessary numbers and statistics

People can only absorb two or three statistics per page. Unless there is a requirement for precise figures, for example in a scientific paper, it is better to simplify statistics. For example:

48.7 per cent is clearer if expressed as: about half
495,000 is clearer if expressed as: approximately half a million

9. Concentrate on your opening paragraph

The first paragraph, often called "the hook" by journalists, should:

- Grab the reader's attention
- Introduce the main body of the text
- Be short and succinct
- Avoid the use of figures, brackets, or anything else that will break up the first sentence

10. Avoid using language that may offend people

Knowing about your target audience is essential. Some words are offensive to particular groups but not to others. If in doubt, leave the word out.

11. Match the tone to the subject matter

Use language appropriate to the subject you are talking about. If your subject is a serious disease that can cause death, a light-hearted, cheerful tone is not right. However, a light tone may be suitable if you are encouraging young people to play more sport, for example.

12. Check for accuracy

Check facts, figures, spellings and the accuracy of any information you include. If there are mistakes people will not be able to trust your work and/or it may be damaging to them.

Checklist

- Who exactly are you writing for?
- What are you trying to say?
- Are your phrases and sentences short and simple?
- Is the language used familiar to your user group?
- Are all unfamiliar words, terms and acronyms explained?

13. How to edit and proofread

Any communication materials you produce, whether written or audio-visual, will need to be edited and proofread. You have probably read material that has errors and know how that can affect how we read the text. This section refers to editing and proofreading written materials.

Ideally, this work is divided between three people:

- The first person, the editor will review the text and restructure and rewrite as necessary. This can be a lot of work and significantly change the original document.
- A second person, the copy editor (called a sub-editor in the United Kingdom) will check the text to ensure consistency, accuracy, spelling, grammar, punctuation, style and usage.
- A third person, the proof reader, will check the final document or 'proof' to ensure that all the copy editors changes have been made, that no further mistakes, such as typographical (typing) errors have been introduced, and that the text, images and graphics are all correct for printing.

However in small groups and organisations people often have to edit their own writing or the copy editor may also act as the proof reader. If you have to edit your own writing make sure you leave a gap between writing and editing. Whoever does the main editing, make sure that someone else proofreads the document as they will be more likely to notice mistakes or inconsistencies.

If you are producing a number of materials it is worth investing time in developing a brief document to outline your organisation's house style. This will include for instance, if you are using English do you use American or British English? What are your rules on numerals, do you use text up to 10 and numbers from 10 onwards? Do you spell out % as per cent? Do you capitalise Ministry of Health or not? All of these can be outlined.

If a number of people are making changes to the text, you may wish to use standard editing and proofreading marks (see the next section: Editing and proofing marks).

Getting started - editing

- Check the structure. Often during the first edit, particularly if the author is not an experienced writer or if the work is the product of a group of writers, you may find that the document needs to be re-structured. Once the structure is improved, the entire document may make more sense.
- Find out how much space you have for the text, and estimate how many words will fit into that space. Then count how many words are in the text (you will be able to do this electronically in your word processing package) so you know whether it is too long or too short.
- If you have enough time, read through the whole text without making any changes at this stage. Do you understand what the author is trying to say? How clear is it? Is the text interesting? Does it seem appropriate for the intended audience? Are all the sections written in the same style?
- Write a rough list of the main points. Authors often include too much detail that hides what they are trying to say. Your job as an editor is to pick out the important points and make sure that any extra detail helps make those important points become clearer. Deciding what is important involves also deciding what is not necessary.
- Is any essential information missing that would make the text more relevant and useful to the reader? Is anything unclear? Ask authors for clarification if necessary.

Detailed copyediting
When you have worked through the above stages you will understand the shape and direction of the text – what the writer is saying, the main points and what order they should appear in. You are now ready to go through the text and start editing in detail. Below is a summary of how well written text should read. This is how the text should be after you have finished editing it.

Checklist for editors and copy editors

Checklist for editors
- ✓ Is the opening paragraph clear and engaging? Does it 'hook' the reader?
- ✓ Do the sections and sub-sections follow a logical order?
- ✓ Are the headings and sub-headings appropriate for the text that follows and do they follow a consistency of style?
- ✓ Are sentences short and clear?
- ✓ Is there any jargon, unnecessary technical or official language or any unfamiliar words?
- ✓ Do the style and tone match the subject matter and audience?

Copy editors
- ✓ Have you created a contents page?
  Do you need a glossary or bibliography?
- ✓ Have you checked the accuracy of all facts and information?
- ✓ Have you checked that the headings and sub-headings are consistent in the text and in the page of contents?
- ✓ Are all names of people and places spelt correctly?
- ✓ Is the spelling, punctuation and grammar correct?
- ✓ Have you made sure that there is no plagiarism —that 'borrowed' material is adequately referenced and that copyright and necessary permissions have been obtained?

When you have done a final edit of the text, you will need to share it with the author for their approval. If you have been working on a document for a long time it can be very difficult to let someone else change so do not be worried if they are not happy with everything you have done! Be ready to explain why you have made changes and be willing to make further revisions in discussion with the author.

Once the final draft text has been prepared it is ready to go to the designer for design and layout if you are using a separate designer (see:

How to design).

Proofreading

Once a final draft copy of the resource has been edited and designed, this draft is given a final check for typographical (typing, spelling and punctuation errors), layout and design. This is a 'first proof'.

The proof-reader usually starts by marking up the headings on the proofs. Each level of headings are marked with a letter in the margin with main headings referred to as A headings, the first level of sub-headings marked with B and the third level marked with C and so on. Other things to check are shown in the checklist below.

Checklist for proofreaders

- ✓ Have you checked your section headings? Are they in a similar writing style or do any need changing? Is the heading in the body of the text the same in the table of contents? Is the font style correct for the different levels of heading?
- ✓ Have you checked your caption headings – for figures or diagrams, photographs and other illustrations?
- ✓ Are all the pages included and are they in the right order?
- ✓ Has any text been missed off the end of a page, article or text box?
- ✓ Are all the design elements, e.g., boxes and bullets, consistent in style?
- ✓ Are appropriate pictures in the right places? Do the pictures hide any of the text?
- ✓ Crowding – is there too much included on one/each page?
- ✓ Are there any figures, graphics or photographs missing?
- ✓ Are all figures, graphics or photographs correctly titled in the text and in the contents page?
- ✓ Are all figures, graphics or photographs correctly placed in the text?
- ✓ Do captions match the pictures?
- ✓ Are photographers correctly referenced?
- ✓ Are headers and footers correct?
- ✓ Are all logos included on the front or back covers as appropriate and are they positioned correctly?
- ✓ Is the date and place of publication included and any authors and editors etc. appropriately referenced?
- ✓ Have you checked the names of all people referred to?
- ✓ Are there any typographical or spelling errors?
- ✓ Is the layout correct?
- ✓ Are any colours used correct?

If you are sending the proofs to a printer

- Make corrections as clearly as possible in a coloured pen (preferably red)
- Sign and date each page
- Take copies of the page proofs before and after you have corrected them.

Once these changes have been corrected, the second set of proofs is checked against the first. Assuming that all corrections have been correctly made and no new ones introduced, the document is sent to print and final production. Before you send materials for production (printing), make sure they are as close to perfect as you can make them, as changes after this stage cost money.

Because proofreading is the last stage before a resource goes to final production (printing or uploading to a website) and mistakes made at the proofing stage can be very costly, for instance, because a publication has to be recalled and reprinted and distributed, the proofreader should have proofreading experience or be supported by someone who does.

When you get corrected page proofs back, go through the proofreading process again until you are satisfied that there are no errors. As a general rule, when you are working on the second set of proofs, do not mark any further changes unless absolutely necessary, otherwise you will be creating more work for the designer which can cost time, money and their good temper! Additionally, a printer will usually charge you a fee if you want to make a change after they send you their first set of proofs.

14. How to design

This is a brief introduction to key issues relating to design, including how to get started and principles of good design. Design is important to all communication and information resources. Although our focus below is on printed material, the principles and processes are relevant to different types of resources.

Before you begin

Design has two key purposes: it should attract the reader and it should present the material in a way that is clear and easy to read.

The following issues have a bearing on the design of your resource:

- characteristics of the target audience (for example, are any of your users visually impaired?)
- supporting resources available for the project (money, time, expertise).

Learning from analysis of existing materials

To become more aware of the importance of design, look at a variety of similar materials carefully. Which of them attract the reader or user and present the material in a clear way? How? Which do not, and why not? This practical exercise will give you ideas about what to do and, importantly, what *not* to do.

Has your own organisation already produced any information or communication materials? What can you learn from their design? Has the design used in any print publications proved successful? If so, you may be able to use or modify an existing design. Do you need to continue a design theme that has been used before, in order to give a recognisable visual identity to a series of materials?

The following issues affect design options

Think about printing, available supporting resources and cost, which will affect design options. For example, the price of printing in four colours (the required number for printing in "full colour") may be more than you can afford. What sort of paper will you print on - what 'weight' (how heavy) will it be and will it have some kind of coating? What are the financial implications of your preferred choice? Do you need to compromise?

Can you design the resource in-house, or do you need to buy-in expertise? Since word processing programmes (such as Microsoft Word) and desk-top publishing (DTP) programmes (such as Adobe Indesign and QuarkXpress) have become widespread, it has become possible for people without any specific training to design and layout print materials, although you will need someone who knows how to use these programmes.

Using a professional designer will result in a superior product because of their technical knowledge and understanding of design. However, using a professional designer will also increase your production costs.

Think about your budget, user group, in-house skills and the size and complexity of the project. This will help you decide whether it is sensible to manage the design in-house.

Designing the resource in-house

If you do go for this option you will still need to prepare a separate design brief (see: How to commission). Keep your design simple and 'clean'. Begin by sketching a rough design using pencil and paper. If your project is a book, attempt to design three or four typical pages using a DTP programme. Don't be satisfied with one rough design - try to come up with several options. Pass the rough designs around members of the team for comment and discussion. After this, you should be able to agree on a rough design that is good enough to take further. There will always be a lot of refining to do. The section below on "Key design principles" will help to guide this process.

Using an external designer

If you opt for a professional designer or any other outsider to do the work, you will need to develop a written brief for them (see: How to commission). Ideally you will want the services of a professional who is familiar with your area of work and target audience. Identify a minimum of three designers' and request samples of their work, references, and quotations for the work.

Once you have identified your preferred designer, discuss the brief with the designer, ensure that you are both clear what is expected, and on when the work will be delivered. Keep monitoring work in progress and reviewing early drafts that the designer produces. For example, if the project is a 64-page booklet, make sure you check the first few pages before the designer goes any further. The principles below are relevant to the design of any resource and should be kept in mind throughout.

Key design principles

Consistency in appearance

This is important in any project. For example, when the reader of a book turns from one page to the next they should not find that the typeface or the number of columns changes. Inconsistency confuses readers. To ensure consistency, professional designers develop a 'template' for each project. They take a blank page, mark in where the margins will be, the columns, the position of illustrations, captions, margin notes, and so on, which every page in the project follows. Some variation will occur but should be planned in advance. Another aspect of consistency is that all publications may need to follow a 'house style' for design – in other words, people will be able to recognise that they have all been produced by the same organisation, and, if appropriate, form part of a series. However, if your house style is not working well or is inappropriate to a certain resource, be prepared to change it.

Avoid over-crowding

A crowded page is off-putting, especially if the readers' reading skills are limited. Do not try to squeeze in too much information in an attempt to save paper or money. If the number of pages previously allocated to a project is not enough, it is generally better to cut out some words and/or pictures than to reduce the size of the font (text) and illustrations. You do not have to fill every bit of the page with text. White space often improves the appearance of a page.

Style

There are many typefaces (fonts) to choose from, but some are distracting and difficult to read. It is generally better to stick to the better known fonts which include: Helvetica, Arial, Franklin, Bookman and Times New Roman. The fonts where letters end with curly tops and tails (like Bookman and Times) are called 'serif' fonts. These are generally agreed to be best for the 'body' (main) text. For headings, tables and lists a 'sans serif' font like Arial or Franklin (with no curly bits) is preferable. Do not use too many different fonts; a maximum of three per page is recommended.

Size

Newspaper articles use a typesize of about 9 points, which is quite small. For clear, easy-to-read body text you are advised to use 12 point, and no smaller than 10. The font used in this text is Arial 11 point.

Headlines

These must capture attention and should be bigger than the body text. Try 24 point for a main heading and 18 for a subheading. You can also keep subheadings in the same size as the body text, but put them in bold, and on their own line.

If your resource has headings, subheadings, secondary subheadings and so on, you need to indicate this hierarchy in a clear manner, with the most important heading looking most important. Try and use the same font for all the headings, perhaps with different point sizes. Avoid underlining wherever possible, as this looks untidy.

Appropriate line and paragraph spacing

The space between lines of text is known as leading. In a DTP programme you are able to vary the leading, but think carefully before you change it from the 'auto' setting, so that you don't make the text too squashed or spaced out.

The space horizontally between words and letters is called tracking. Again, be careful about changing this from auto, or your text could become difficult to read. As a general rule, do not change the tracking below -3 or above +3.

Type size and column width need thinking about at the same time. Large text looks strange in a narrow column and becomes difficult to read. There should be no more than 13 words (of average length) in a line. Similarly, don't use small text in wide columns.

Appropriate and correctly sized illustrations

Illustrations serve a purpose by appearing attractive and breaking up the text. They should also directly relate to what you are trying to say. The general rule is to stick to one message per illustration. If your audience cannot read or write, illustrations will be the most important part of the project and the resource should reflect this. Wherever possible illustrations should be produced with users rather than adapted from elsewhere. Make sure that any illustrations used are big enough. If used small to save space, a good illustration can loose so much impact that it is no longer worth having.

Use of colour

Colour helps pages look interesting, but can be distracting. It also increases printing costs and could cause problems if you are using basic printing facilities. Check that any colours used are culturally appropriate; in some cultural contexts particular colours have certain connotations.

Use of symbols

Symbols (bullet points, crosses, arrows, and so on) can be useful, but again caution is needed as their meaning changes in different cultural contexts. Make sure that any symbols used will not be misinterpreted. As with fonts, avoid using too many different symbols on the same page as this could be confusing.

Beware of over-the-top design

Don't get carried away using desk-top publishing. Amateurs often make errors of inconsistency, spacing, using too many or inappropriate fonts and creating a 'messy' appearance. Remember that good design is simple design. More complicated design can cause problems at the printing stage, particularly if you are using basic printing facilities to save money.

Does the draft resource achieve what it is supposed to?

It is important that design does not come to be of higher priority than the content of any resource. Before you agree on a final design, check that the resource still emphasises the intended message/s, as well as appearing attractive and clear.

Pre-testing

Even if you have followed appropriate design principles, you cannot assume that the resource will be clear and attractive to the target audience. It may take several attempts before you get the design right. Once you have thoroughly drafted a resource, or some pages of longer printed material, you are advised to think about pre-testing (see: How to plan communications materials).

15. How to improve media engagement

The media can play a major role in improving transparency and accountability around health and access to medicines. Their engagement with the issues of medicine prices, quality, availability and use is important and encourages public debate.

Effective engagement of the media on medicines issues can also ensure that the general public has a channel for expressing the issues and concerns that affect them.

What is the media?

The mass "media" are now in many different forms: print media, with traditional newspapers, journals, publications and magazines. There are also media that are primarily electronic and internet based. Radio and TV are an important form of media that can reach a wider number of people. The table below gives a sense of the number of different outlets that exist.

All of these media have "journalists" in common, people who are trained to report news and write commentary. A media company may employ them, or they may be "freelancers" who write their own stories and sell them into publications. There is also a growth of "citizen journalism" where people report their own stories. This is linked with the rise of "social media" using tools like twitter, blogs, facebook and YouTube. These can be effective in putting individual and personal stories across to a wide audience.

	Print	TV	Radio	Internet	Social Media
Immediate		x	news	x	x
Daily	x	x	x		
Weekly	x	x	x		
Monthly	x				
Local	x	(x)	x	x	x
National	x	x	x	x	x
International	x	(x)	(x)	x	x

When should you engage with the media?

Your communications strategy will have identified the right time for you to engage with the media. It should be very clear why you are planning to approach the media and often a written, internal brief may help with this. Your brief in particular should explore any risks that there may be in engaging with the media. These should be weighed up. Sometimes it is worthwhile going ahead with a risky venture when all other options have been explored and you know that they will not lead anywhere. By identifying the risks, you can plan to make them smaller. Your media brief may look like this:

Media brief
Story to be covered:
Key messages to be covered:
Style of coverage: Direct story, quoted; indirect story – commentary on someone else's article; personal story – bylined by author; correction or matter for consideration – letter to the editor,
Best form of media: (eg press, TV, radio, internet)
Form of interview: press conference, press briefing, 1:1 press interview, telephone call, press release
Main spokesperson:
Risks: (eg story gets blown out of proportion, story offends politicians, story misrepresents issue)

Generally, you may want to raise an issue with the media in the following situations:

- Where you have key messages that you would like more people to know about
- If you have launched some new research, held an important meeting, spoken with key stakeholders or if you have achieved something new and different
- Where you have a report or publication that you would like to be made more publicly available
- You may also wish to use the media if you believe that wrong or misleading information is in the public domain
- You can also make your point in response to a topic that has arisen – you might want to write a letter to the Editor for publication, or be known as an organisation that comments on a certain issue.

The checklist below has drawn heavily from the Wilder Manual (Angelica 2001) and it runs through some steps that you might wish to take before engaging more actively with the media.

Media ready checklist
Organisational Assessment:
Do you have a communications strategy?
Does your communications strategy have a media plan?
Do you revise the media plan on a regular basis as your work evolves?

Organisational Infrastructure:
Do you have a staff person who is responsible for carrying out the media plan and coordinating all the media efforts in your organisation?
Do you have a planning calendar of key events?
Have you identified primary, formal spokespeople?
Do they need media training and preparation?
Is the chain of decision-making for media statements clearly designated and understood by everyone within the organisation?
Does your budget have a media component?

Media systems:
Are your media lists up-to-date, complete with names of reporters or producers for all media outlets you plan to use?
Do you know deadlines and preferred communications modes for journalists?
Do your lists distinguish types of coverage: news, feature, editorial, columns, calendars?
Are you in regular contact with reporters you have designated as key contacts?

Is your information media ready?
Do you have accurate, concise, interesting information about MeTA in your country?
Have you prepared clear messages and talking points for the issue you plan to raise?
Do you maintain an information base that is a valuable resource to the press, including a portfolio of data and stories, and a list of staff who are willing to talk to the press?

Building capacity and opportunity to work with the media means building relationships with those who work in the media, particularly journalists. You are a resource for them just as much as they can be a resource for you. The box below explains how that relationship can be built and maintained.

Be available Give reporters, especially at news services, out-of-hours mobile numbers and tell them it's OK to call.
Seek journalists at meetings etc and give them your business card.
Be ready to be quoted Having to call back once the quote has been cleared will reduce the chance of the quote being used.
Know the issues Read and comment on developments relating to your cause.
Don't always assume journalists have received the information you have about topical events or relevant news releases.
Know your facts never pass on information unless you know it's true.
Know where to find information or contacts fast and therefore gain a reputation as a good source.

Source: Salzmann, Ch 5, p.67

What do the media want?

Getting into the media can rely on a number of things. The most important is having a credible, well-constructed story. A story can rely on a number of things – a hard evidential report or research; a new development or issue; a visiting person or event; the creation of a new entity. However, it is important that you use your opportunity creatively and "paint" the picture in an attractive way.

You might also want to find a "news hook." This could include a court case, legislation in Parliament, a related news story, an anniversary (eg International HIV Day). You can use the "hook" as a way of linking your story to the issue. You do not always have to make the hook explicit to the reader; you can use it to give the journalist a reason to run the story. Publications, new projects, and high profile meetings or visits are all reasons your organisation might try to make the news.

Sensitivities

It may not always be appropriate to gain media coverage. This is especially the case with very sensitive or controversial or political topics. It may suit your cause more to have detailed "behind the scenes" lobbying or campaigning. This is why you should always have a media strategy for each activity that you undertake which should draw out these issues. Sometimes, issues may simply be too sensitive to take to the media, and you may need an outlet that allows you more "control" such as an article written by you or simply an announcement on your website that you can drive people towards.

It can be difficult if the person speaking with the media or journalists is not fully aware of all elements of the story, or is unused to speaking to the media. Make sure they have media training, if it is available and appropriate. Always brief them just in advance of the interview.

Ensure that you know the "angle" of the story that the journalist is taking. They may telephone to ask what you think about a certain drug. Before you tell them, try to understand why they want to know by asking "what is your angle?" – they may be planning to do a positive story about its benefits, or they may wish to uncover corruption, or write about counterfeiting. All three are completely different angles and how MeTA wants to be portrayed will change dependent on where the story is going.

There are different terms that journalists use and it is wise to check before any media engagement what particular journalists understand from different terms. To this end, you should be aware of the following definitions (which can be different in different cultures, so please check what is relevant in your country):

- "on the record" = you and your organisation can be named in full as a source and quoted
- "off the record" = neither you, nor anything you say can be used
- "non-attributable" = what you say can be used, but it cannot be linked to your name or organisation

The point of giving an "off the record" quote is to allow a journalist to pursue a story and to guide them in the right way. You should use this wherever you do not want to be identified. Always make sure that you have established your terms of engagement with a journalist. If you are speaking on the phone, request to have an entire conversation "off the record" first, then agree afterwards a quote that can be used "on the record."

If in doubt, do not say anything that you do not want to appear in print!

Remember that a good journalist will always need to find two "sources" or two different organisations to comment on a story. There are times when you may be asked to be the person or organisation used to "back up" a story. If this is the case, consider your relationship with others in the story and make sure you pursue the "angle" with the journalist, so that you do not end up criticising or undermining another organisation without meaning to.

Different ways of releasing information to the media

Depending on the information that you would like a journalist or a type of "media" to cover, there are different ways to release this. The most obvious is through a press release (see:

How to create effective press releases) In general, it is a very good discipline to write a press release, because it focuses people and ensures everyone is clear about the key messages. It also allows you to talk with whomever you might want to quote and get their sign off and approval.

“Exclusive” stories

A journalist gets sent hundreds of press releases a day. You may therefore also want to consider telling one journalist a story and agreeing not to tell any other news outlet the story until it has been written. This is called an “exclusive.” Be aware that if you agree to an exclusive with a journalist, you must ensure that you can keep this promise – you must not let the story be covered by any rival media. A journalist will tell his/her editor that they have only received the story on this basis and this is probably why you may get prominent coverage. You should be wary of using this tactic too often, as most journalists want to be seen to be getting the “new” news (which is why it’s called news!) but from an organisational point of view, it can damage your credibility. It can also mean that other journalists who were not granted an exclusive may not want to deal with you. The best time to use an exclusive is when you want a story in a particular paper and to appear at a particular time.

Briefings

You could also consider a one to one briefing with a journalist, where you have a meeting and talk about your activity and see what might be of interest to the journalist. This is a more passive way of getting coverage, but a good one, because you never know what might be of interest to the journalist. It also is a good way to “pitch” ideas and come up together with some thoughts about what stories might work over the next few months.

Press conferences

Press conferences should be used when there is a large, complex announcement with a number of different bodies, which may want to appear together at an event and answer questions. If you have a celebrity or a minister, for example, making a big announcement, this is seen as a very fair way of releasing information to all journalists. When you arrange a press conference, you should issue a “Press Call” in advance so that people know where and when to attend. You may wish to say that this is for accredited media only, and check press passes on the day. The general format is for a panel to make a comment on the issue, then to ask reporters for questions. Your panel should be briefed very clearly and be aware that anything they say is most definitely “on the record.”

Features

A feature is generally a story that is less time dependent than a news story and may go into more depth about an issue. This is an excellent way to get MeTA coverage, because of the complexities of the issues that we cover. A paper will probably have a features editor and a features desk. In advance of contacting them, sit with some colleagues and brainstorm some ideas about issues that may not be of direct interest, but might be newsworthy. For example, you may know a publication that has dedicated pages for innovation, every month. Consider what output you might have that could fit into this. Or another publication may look at doing profiles of key influencers – is there someone in your network whom you might put forward for this?

If you are “selling in” a feature story, do consider taking the journalist to meet people and beneficiaries most affected by the situation you are trying to portray. Ensure beforehand that they are happy to talk to a journalist and that they are not in any danger by doing so. If necessary, protect their anonymity. Most journalists are happy to do anonymous interviews, but only when they know that there is a compelling reason to do so.

Leader column

Most publications have a “leader column” where the owner of the paper is able to express their own opinion. Throughout the rest of the paper, they are meant to simply “report” the news without bias or angle. If you know the tone that the paper normally takes and if it is similar to yours, you could contact the editor and talk to them about your issue, with a view to them writing a leader about it. Generally, a leader column will pick up a news story.

Bylined article

Some papers will accept articles written by others under their name. The “byline” is the name that always appears next to an article – it is generally that of the journalist. It can be good for a paper to have a different “voice” writing for them. These are very good opportunities to get your entire story across. Make sure that whoever writes the article matches it stylistically to the issue – if it is serious, then make sure that is mirrored. If it is a lighter article, then you can afford to use some anecdotes or stories.

Letters to editors

Sometimes a topic that you are working on will appear in the press without your knowledge. If the article is not representative of your stance, you can write a letter to the editor, for publication. Sometimes, you can group together a number of people to reply to the article and sign your letter. You can also telephone a letters’ editor in advance and find out when might be a good time to submit your letter – they are generally keen to help. Make sure that you refer to the original article in your letter and make concise, extremely short points. Space is at a premium on the letters’ page.

Journalists

Journalists are often under pressure. If they are writing for a daily newspaper, they will generally have a morning conference with the editor, spend the morning following up leads and be writing to a deadline in the afternoon. Try and find out the best time to call a particular journalist – mid morning after conference is always good. If you telephone a journalist, always ask if it’s a good time to speak, particularly if you are pitching an idea. Be prepared to pitch your idea in as little time as possible – sometimes just thirty seconds! What you say in this time will influence whether they can write the story or not. Don’t be put off if a journalist is abrupt – they will just be assessing your angle.

16. How to create effective press releases

Press releases are short, concise statements that announce news. Any press release should contain certain basic information in the first few sentences:

What is happening?
Who is doing it?
Where and how is it happening?
When is it happening?
Why is it happening? (What are the expected outcomes or results?)

Your press release may not need all five - but often they are all needed to tell the story well. The rest of the press release should tell your news in an interesting and coherent way, giving all the relevant information and stating whom to contact for additional information.

Refer to the section: How to write clearly (in English) for some basic tips about how to make your writing clear and appealing. In addition, consider the following:

- Be positive rather than negative if you have a choice
- Use quotations and examples - they help to bring a story to life
- Be clear and to the point
- Be brief

A press release should have a headline that is eye-catching and be dated. If at all possible, keep the full text within one page. At the most, the release can be two pages. If you wish to use a set release date and time (called an "embargo") this should be clearly stated at the top of the press release (see below). Embargoes are used to give a journalist adequate time to write a story, before their paper goes to print. As most news is currently covered on-line, embargoes are becoming less and less relevant. You can therefore write: "For immediate release" at the top of the press release.

You should have two paragraphs at the bottom of the release, with a heading "Notes for Editors." This should include a paragraph about the company (or companies involved) and further information about the issue you are writing about. It should include a website address that is appropriate and a name and contact details of the person who can be contacted for further information. If necessary, provide an out of hours number.

Do not send press release to a journalist as an attachment. If you have a lot of additional information such as photographs, reports or studies, and other supporting documents that might usually be included in a printed media kit, put them on a website and include the website address (URL) in the press release.

Your press release may need to be emailed out to journalists, in which case, the formatting above simply goes into the body text of an email. Make sure the "Subject" box of the email contains short information about the press release. Always put a copy of the press release onto your website.

And remember, as with all communication work, the press release on its own is unlikely to achieve everything you want. Follow up with a phone call to key journalists to see if there is more information they would like.

Tips on writing press releases

- Determine the main angle you wish to communicate
- Connect the report to a "hook" unless it is strong enough as a stand-alone story and write the headline
- Check deadlines for local publications/television/radio bulletins to ensure the media release is received in time to be published before the event. (Some local newspapers have a Friday deadline for the following Wednesday publication dates. Radio programmes may need to check the spokesperson to see whether they will be suitable for on-air interview, etc.)
- Keep the focus local (with local spokespeople) for local papers. Send only major capital city issues or state-wide issues to state papers; only national issues (and use national spokespeople) for national papers/magazines.
- First paragraph of no more than 25 words telling briefly who, what, where, when and why about the event, issue or project.
- Use short sentences and clear language. Avoid jargon and difficult words. Keep it simple. Make numbers more meaningful by making comparisons or breaking them down into familiar units.
- You should attempt to use quotes in the body of the release, quote credible spokespeople and identify them with their positions in the organisation. If you are working with other partners, it is usual to obtain a quote from each partner.
- Keep information clear and unambiguous.
- Keep releases short, no longer than one page. If the media want more information, they will contact you.
- Track coverage to see how and when your information is published.
- Be sure to write and thank the journalist to develop a relationship that may encourage them to work with your organisation in tracking progress on the issue/project, and hence keep the community informed.

17. How to hold a face to face meeting

There will be times when you need to hold face to face meetings, often with key influencers or policy makers. These can be extremely effective in getting your messages across and should be used particularly when you want to have a more in-depth and persuasive discussion. The advantages of this approach are that you can really get an "emotional" and "human" level to the discussion, that you are unlikely to do just through briefings or transmitting information. Deciding when to hold this meeting will come from your communications strategy, or if it is about a particular issue, may be in your advocacy strategy.

This type of meeting is very useful when you need to understand where your policy maker or influencer is positioned in a debate. They will be able to tell you their thoughts and opinions firsthand. In order to set up a face-to-face meeting, it will be necessary to formulate your case. You will need to find the points that will ensure that the person will meet you. If you are approaching a politician, remember that they are an "elected" person, so you will always have a right for consideration for a meeting.

Generally, it is best simply to write a compelling letter. Make sure that you have researched why this meeting should take place. Outline this in the letter. State why you are targetting them and when you would like the meeting to take place. End by offering to follow up with their office for a meeting. Sometimes however, politicians are extremely busy. You may be offered a meeting with a civil servant instead, in which case, always accept.

There are times when you know a letter will not work adequately. Consider more than one organisation coming together to make a joint approach, which might be more compelling and a better use of the person's time. If this is the case, make sure the letter is signed by each organisation.

Prepare for the meeting

Know your target: Make sure you know as much as possible about the policy maker. What is their feeling about the issue? How did they vote/what have they said about the issue? What influences them? How do they make decisions? Who do they listen to, who are their advisors?

Focus your message: Choose your main objective and develop a simple message from it:
What you want to achieve
Why you want to achieve it (benefits of taking action and /or the negative effects of not doing anything, evidence for the problem, both facts and stories)
How you propose to achieve it
What action you want the policy maker to take

Write a briefing paper for attendees from "your side" with the information above. Include everything you know about the issue. Make sure you say in your brief what outcome you would like from the meeting. This could be anything from a follow up meeting, to a change in policy, through to a verbal commitment from the person to take your case forward.

Choose the right messenger: The messenger can be as important as the message. Someone directly affected by the issue may be able to personalise the issue and get the policy maker's attention. Make sure the messenger has the appropriate negotiation skills and attitude to get a positive outcome. Ask if you can take someone with you as a note taker.

Hold a pre-meeting with the attendees from "your side" so that you can rehearse who might speak to which point and to ensure all points are covered.

Contact the office of the person whom you are meeting and suggest an agenda – remember that if you are meeting a politician or decision maker, they will be likely to have a briefing on their meeting prepared by their advisers. Often, it can be very effective to brief these advisers in advance. Find out how many people are attending the meeting and who they are – depending on who they are, this will tell you the angle that the meeting is likely to take.

During the meeting ensure that all parties have appropriate time to speak and make their case. Generally, the people requesting the meeting should outline their aims and goals first. Make sure that you allow space for a response. Ask open questions if you are met by resistance or by confusion: "Could you explain more about your stance?" Ask for some concrete advice or thoughts on the way forward. Ensure you ask about the status of the meeting – if it is confidential, you must respect that.

After the meeting
Write to the person you met, thanking him or her for the meeting, briefly repeat your key points and any supporting comments made by the policy maker, especially any promises of action. Tell the policy maker what you plan to do next, promise to keep him or her informed and express the hope that you will be able to work together in the future.

If necessary and appropriate, copy others into the letter, so that they are aware exactly what happened in the meeting. Make sure you debrief other key stakeholders who might be interested in the outcome of the meeting. If necessary, update your communications strategy or position as a result of the meeting. Ensure that you respect any confidentiality issues.

18. How to monitor and evaluate

Whether you are producing a communication product, or designing a health promotion intervention, it is important to monitor and evaluate your work.

- **Monitoring** refers to the continuous review and supervision of activities and the use of these findings to improve a product or implementation of an intervention.

- **Evaluation** refers to the assessments that determine to what extent your product or intervention has been effective.

Monitoring and evaluation answer different questions, are implemented at different times and have different purposes.

You need to plan how you are going to monitor and evaluate your activity right at the beginning when you are designing it. You will want to use different tools and approaches depending on what you are monitoring and evaluating and who your target audience is.

The box below outlines some of the differences between monitoring and evaluation of health promotion interventions.[13]

Monitoring **– answers these questions**	**Evaluation** **- answers these questions**
What is happening in the implementation of the health promotion plan?	What happened as a result of the health promotion plan?
What is happening? (gaps &flaws)	What behaviour change took place?
What are the effects of the programme (among target groups, health workers, in health/education services)	How many of the target group have changed behaviour?
	Why did the target group change behaviour?
	What was the overall health impact on the target group?
Purposes	**Purposes**
To correct, re–orientate or redesign plan	To demonstrate the impact of health communication
To adjust the communication strategy	To find out the level of behaviour change
How can the programme be fixed, corrected, re–aligned?	To find out the impact on health status

Monitoring

- Monitoring begins immediately the programme starts and continues throughout
- Data is collected periodically and frequently at agreed intervals or when something special is needed
- Monitoring is done by those who are implementing
- Data is analysed as needed and used immediately for programme change [14]

Pre-testing communication materials are one form of monitoring that can be used. Pre-

[13] Adapted from Notes on Health Promotion and Behaviour Change, Hazel Slavin and Ken Swann for DFID's Partnership for Transforming Health Promotion in Nigeria 2 (PATHS2) programme.
[14] Hazel Slavin and Ken Swann as above.

testing materials with members of the target audience ensures that the materials are understood in the way they are intended, are relevant and appropriate and appealing for the audience. It also opens a dialogue with people for whom the material is being developed, and often gives the pre-tester new knowledge. Pre-testing materials as part of production can also save time and money later.

Pre-testing checklist

- ✓ Recognition: Have the materials been understood? Are the contents perceived the way they were intended?
- ✓ Familiarity and relevance: Do they recognise the people presented as people they can identify with? Is the problem one that the audience is concerned with?
- ✓ Acceptability: Are the materials acceptable to the audience? For instance, is the language appropriate? Does it give proper respect to elders or particular community groups? Are the suggestions actionable – or do they require money, equipment or choices people don't have?

Examples of problems that have arisen with visual material such as posters include:

- women depicted not wearing their head scarves in the way women do locally and therefore the target group do not identify with the women in the poster
- because the mosquito has been enlarged for design purposes people do not recognise it as a normal mosquito and rather see the message that if you use a bed net you face the danger of super-size mosquitoes.

One popular way to pre-test materials with community members before final production is to carry out a focus group discussion (see section on How to conduct a Focus Group Discussion) referring to the materials. For more specific technical materials you may want to carry out a peer review among selected health workers or technical people. You may want to send out a questionnaire to reviewers to ensure that they address the key questions or concerns you have and then you can leave a section at the end for additional comments.

For instance, if you are planning the development of a health promotion poster in a rural community you may want to use one or more focus group discussions (see: How to carry out a focus group discussion) with members of your target audience to check that they see what they you want them to see when they view the poster *before* you spend money on printing and distributing it. All material must be pre-tested by the members of your intended audience.

If you are producing an information booklet for young people, you should share draft copies with young men and women asking them either for their comments or providing a questionnaire with specific questions and space for their own comments or questions. Questions might include:

- how useful they find the booklet (scoring 1- 5)
- if they have questions that the booklet has not answered and if so what these are
- what they liked about the booklet
- what they did not like about the booklet – and how they would change it
- if they feel they will change their behaviour as a result of the information provided and if so why?
- if they feel that they won't change their behaviour as a result of the information provided and if so why?

- any other comments or suggestions
- does the booklet show people similar to them and their friends?

Evaluation

Evauation data is collected at specified intervals for example:

  - Before interventions begin (baseline)
  - After several years (2–3 to look at interventions, 3–4 to look at behaviour change and 5+ to look for changes in health status)
- Data collection must allow for sufficient time to show impact
- Research is usually conducted by researchers not directly involved in the health communication activities
- Data analysed and used at central level after programme completion.

Evaluation determines to what extent your intervention or product has been effective, Evaluation findings provide credibility for the chosen methodology, and for Health Promotion and it answers the following:

- What change(s) happened?
- How, when and in which groups did changes happen?
- Which aspects of the intervention contributed to these changes?
- Which aspects of the intervention should be changed to improve management of similar future programmes?
- How cost–efficient was the intervention?
- How did the results of the intervention compare with results of other similar interventions? [15]

For evaluation of communication materials where behaviour change is unlikely without complementary activities, it may be simpler to collect information on perceived effectiveness of the material from your intended audience for instance through readers' surveys or questionnaires.

[15] Adapted from Hazel Slavin and Ken Swann as above.

19. Further reading and sources

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