

Think Tank Initiative's Policy Engagement and Communications Program — Anglophone Africa

A toolkit for researchers and
communications officers

INTRODUCTION

In July 2013, 13 think tanks in Ethiopia, Ghana, Kenya, Nigeria, Tanzania, and Uganda embarked on a mission to strengthen their Policy Engagement and Communications (PEC) capacity. **Over the course of 15 months**, the think tanks worked with a mentor to diagnose their capacity needs and develop a PEC workplan to strengthen their knowledge and capacity. Work included designing and refining communication strategies, engaging peers and external stakeholders, and leveraging tools to sharpen their strategic messaging and outreach. Our hard work resulted in the creation of new tools, skillsets, and shared lessons and strategies.

This toolkit is a collection of the knowledge generated over the course of our work. It is intended to help our 13 think tanks - and many others - continue excelling and improving in their PEC abilities. It contains guiding principles, tips and suggested approaches to help better plan, package, disseminate and evaluate PEC strategies.

And lastly, to our PEC group: **thank you** for contributing to what has been an exciting and thrilling year for the overall program.

We wish you the best of luck!

**Results for Development Institute, CommsConsult, and the entire
Anglophone Africa PEC program team**

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Developing a Theory of Change

Authors: Courtney Tolmie and Andrew Clappison, PEC Program Team

If you are new to using theories of change, one of the first questions you may have is “what is a theory of change?” While there are many definitions, most agree that a theory of change explains the pathway through which a specific result or goal can be achieved. Theories of change can be extremely detailed or fairly simple. However, most theories of change have at least three major components.

1. **What are the result(s) that you are trying to achieve?**
2. **What are the steps or activities that you will take in order to achieve these results?**
3. **How will these steps or activities lead to these results?** (Some organizations call these assumptions, while others think of these steps as intermediate outcomes).

A simple theory of change (TOC) often takes the form of a linear pathway – with results defined on one side, and activities on the other. The assumptions or “how” are in the middle, defining the pathway from activities to results.



How can you create a Theory of Change?

- Start with the RESULT(S) - define what you are trying to achieve.
- Work backwards – what are the ASSUMPTIONS that must be true to achieve the defined result.
- Define the ACTIVITIES that your organization can undertake to ensure assumptions hold. Note that there may be multiple layers of activities and assumptions – TOCs are not always simple and linear.

What can (and should) you do with your Theory of Change?

1. Create an initial Theory of Change – and ask for feedback.
2. Define a plan to monitor and evaluate your Theory of Change (remember that you may not get it right the first time).
3. Use the information you get from your monitoring and evaluation in two ways.
 - Build it into your future work
 - Use it to revise your TOC

I'm lost, can you give me directions?

That depends. Do you know where you want to go?



Exercise for those new to TOCs:

- Select a project that you work on.
- For this project, define the Result(s), Assumptions, and Activities.
- Looking back, does your theory make sense?

Additional resources:

<http://www.researchtoaction.org/2014/09/welcome-theory-change-week/>

Mapping Target Audiences

Author: Nick Benequista, Mentor

As you develop your theory of change and objectives, you must also develop a clear sense of who you must engage to help you achieve these goals. Who are your key beneficiaries? Who must you influence to change or pass policies? What challenges might you face in penetrating or influencing new stakeholders?

Steps for Conducting a Mapping Workshop

1. Choose a recent policy proposal of high importance for a single sector.
2. List all of the stakeholders with an influence or interest over that specific policy.
3. Sort the list of stakeholders according to when they emerged.
4. Rank the stakeholders according to interest and power matrix.
5. Rank the top five most powerful stakeholders according to the four stages of the policy process.

Why map policy stakeholders?

- Informs strategic and tactical decisions about research and communication
- Helps think tanks to be better interlocutors and translators
- Is a valuable form of research itself - a window into larger issues – and essential for policy analysis.

How should you start?

- Begin with your researchers – ask them questions
- Define the issue and policy
- Go deeper – desk review, use consultants, **mapping workshop**, interview researchers
- Define your policy objectives

Examples of Techniques

- Stakeholder Analysis
- Force-field analysis
- Problem-tree analysis
- SWOT analysis
- Triangle analysis
- Netmapping
- Drivers of change



Zilper Audi presents IEA Kenya's communications strategy at the July 2013 PEC inception workshop in Accra, Ghana.

Developing a Communications Strategy

Author: Sue Martin, Mentor

There are many components and steps to building a communications strategy for your organization, research project and publications. What follows is a checklist to help you figure out where to start.

The checklist is suitable for any size of project. You may have limited time to map out a plan (for example, to promote a small publication) – in which case using the checklist to structure and organize your thinking may be useful - or for a team embarking on a major new research programme – in which case you may need to work through each stage in more detail.

If possible, don't plan alone. Even 30 minutes around a table with colleagues brainstorming some of the areas below (especially audiences and what do we want our communications to achieve?) will give you ideas and perspectives on the issue. That also means that your colleagues have some sense of ownership, important at the stage when you need to assign responsibilities.

Stage 1: Review

Has our organisation undertaken similar communications before, even if the subject was different? If so, how effective was it? What could have gone better? What's changed (if anything)?

Note any strengths, weaknesses, opportunities and threats for the project in a strengths, weaknesses, opportunities and threats (SWOT) analysis. This can be as short as one page, with short points for each heading. The aim is to help you capture all the internal and external factors that may have an impact on your strategy.

Output

- Brief strengths, weaknesses, opportunities and threats (SWOT) analysis for communications and for the project as a whole

Stage 2: Objectives

What do we want our communications to achieve? What would success look like? How would we measure that success? (For example, how might you want to change policy? Or influence audience behaviour?)

Do we already have formal communications objectives for this project? If so, are these appropriate and realistic? If not, what needs to change?

Check: Are there any likely conflicts of interest between your project and the organisation's overall objectives?

Output

- An overall communications goal, and a set of three or four practical objectives, with one or two measurable results attached to each.

Note: you may use other structures for this, such as a logframe or a Theory of Change (see M&E below).

Stage 3: Responsibilities

Who develops each component of the plan? Who signs off on the plan, and agrees funding? Who monitors? Who implements?

Output

- A note of the communication systems and signoff procedures that have been agreed.

Developing a Communications Strategy (continued)

Author: Sue Martin, Mentor

Stage 4: Audiences

Who are our key audiences? How should we prioritise the needs of different audiences?

Do we already have relevant contacts? What advocates and supporters might strengthen our communications?

Check: Consider which audiences would welcome communications from you (often referred to as a 'pull' approach or 'demand-led'), and which audiences may be less interested in - or even opposed to - your messages (often referred to as a 'push' approach or 'supply-driven').

Output

- Audience audit (sometimes called a stakeholder audit), highlighting priority audiences.
- A list of possible contacts and supporters that you need to involve from an early stage.

Stage 5: Internal Communications

Who are our key internal audiences? What do they need to know? Whose approval or involvement do we need to make this happen?

Should we consider other audiences as 'internal' – for example, steering group members, the project funder?

Output

- A note of internal communications stakeholders and how you plan to involve them.

Stage 6: Messages

What are the three or four most important things we need to say? What facts do we have to support our messages? Why will our audiences care?

Check: Your messages should not contradict your overall organisational messages.

Output

- Draft key message set and two or three key facts to support each message.

Stage 7: Channels and Communications Tools

What outputs are we planning (for example, research publications, articles, workshops or other events)?

Which are the most suitable channels or tools to reach our audiences (for example, blogs, social media, briefings, infographics)?

Output

- List suitable channels and tools, how each will be used, and who is responsible. For example, if you plan to use media, who is your spokesperson, and who will brief and support them?

Stage 8: Budget and Resources

What resources do we need to deliver our communications strategy? Can our plan be delivered without significant costs? What skills and 'kit' do we already have, and what do we need? What can we get for free?

Output

- Brief budget spreadsheet, and note of resources, any gaps, and who is responsible for managing and signing off expenditure.

Stage 9: Timeline

What are our deadlines? What are the milestones (events, dates, deadlines)?

Check: Build in more time than you think you need, especially if your organisation is quite formal about signoff and involving senior people.

Doing things at the last minute, such as printing, or booking venues, almost always costs more.

Output

- Agreed start and end dates for the communications programme.
- Timeline or calendar with key stages mapped out. Let people know in advance if you need them to keep time (for example, to edit material).

Stage 10: Special Circumstances

For example, funder or other external permissions, legal or copy-right issues.

Outcome

- Note of any actions required and who is responsible.

Stage 11: Monitoring and evaluation (M&E)

How do we check that our communications strategy is on track? What should we measure?

How can we assess impact against our objectives (for example, if you are trying to influence policy, have any government contacts cited your research)? How often do we review the impact we are having, and for how long?

Check: Your measures should look at the effect you are having (for example, invitations to present your findings), rather than track activities (the number of papers produced).

Outcome

- Draft M&E plan. You may prefer to use a logframe – for example, if a funder has set out M&E measures for your project – or a Theory of Change, which tracks short, medium, and long-term outcomes against the main change you want to see. See 'Further reading'.

Further reading:

ROMA: a guide to policy engagement and influence, Overseas Development Institute, London, new edition 2014.
Download: <http://roma.odi.org/>

I don't think putting our policy briefs on this table is enough to reach our target audience.

I agree. That's why I added the sign.



Role of Information Partners in Policy Influence

Author: Costantine Shirati, Communications Officer at STIPRO, Think Tank

“It was only when we decided to enter into a partnership with the TASJA, that things changed for STIPRO.”

In the past four years, STIPRO, like any other young organization, had been facing challenges especially on the communication aspect. This forced the organization to conduct a communication audit which indicated that STIPRO did not have a network of information partners resulting in difficulties for stakeholders outreach.

A think tank is basically an organization that performs research in order to influence policy on various issues – it could be social, political, economical, technology, and culture. Most often, people confuse the role of think tanks and academic research institutions. The major difference lies in communication and policy influence: whereas think tanks’ major concern is policy influence/change, academic institutions are more concerned about knowledge generation under the assumption that it is the duty of policy makers to translate research findings into policy action if they wish.

By definition, information partners are people who have influence in communication/media landscape in a given locality. Those might include journalists, effective bloggers, people with influence to the public and on social media, parliamentarians, musicians etc. From a technical point of view, it is often difficult to deal with specific individuals, and we have found that it is more effective to work with those already in a network. For instance, if your think tank is focusing on sports, you can link up with Sports Journalist network; the same applies for health, environment, gender, democracy, science and technology as well.

An example from our experience in this area may be helpful for other think tanks. Four years ago, when STIPRO was first established, there was some thinking that media does not pay attention to ST&I policy issues because the general public in Tanzania is only interested in social and political issues. **It was only when we decided to enter into a partnership with the TASJA (Tanzania, Science, and Journalist Association) that things changed for STIPRO.** The partnership came about through Mr. Greyson Mutembe, who we once contacted for media coverage to our Annual Research workshop. We spent some time talking after the event and he introduced us

to the whole network (TASJA). Afterwards, STIPRO came up with a proposal to engage TASJA in a more formal partnership that entails working collaboratively.

TASJA have members who are journalists working in different media houses in Tanzania, and the partnership between STIPRO and TASJA has mutual benefits for both sides. STIPRO offers capacity building trainings to TASJA so that they are able to cover ST&I issues adequately, and initiates research projects for ST&I media coverage that are implemented by both TASJA and STIPRO. TASJA on the other hand ensures STIPRO research products reach the public, provides adequate media coverage for STIPRO events, and helps in following up on how STIPRO is reported in the media. This kind of partnership can be very fruitful in policy influence and organizational visibility in any context.

Lastly, although I am aware that think tanks operate under different contexts, two things remain in common: one is research and the other relates to research uptake in terms of policy change or applicability of research results in making a difference. **The most important question is how do you achieve this impact and ensure the public you target will now have access to your research findings?** The significance of information partners goes beyond just reporting of the issue to the public, but that it provides in depth focused media coverage. This is because a think tank will be dealing with informers who are well knowledgeable on the research agenda of a particular think tank. In sum, I encourage think tank leaders or communication heads to look for information partners as one of their communication enablers.



Kwame Owino and Costantine Shirati exchange information at the TTIPEC regional workshop in Nairobi, Kenya.

Three Principles for Policy Influence

Author: Nick Benequista, Mentor

In Kenya, where I work, the Kenyan Institute for Public Policy Research and Analysis (KIPPRA) became the country's leading economic Think Tank because it was the government's economic think-tank. Its research findings had a fast-track to policy influence. That is not the case any more in a country where many new voices are joining policy debates; KIPPRA's research stands the risk of being drowned out.

To be heard above the cacophony of opinions, KIPPRA will have to communicate much more strategically, which requires big changes to how it works and changes even to its organizational culture – no easy task.

Think tanks working in African countries with a less tolerant political environment than Kenya have an even greater challenge. How should a think tank communicate its research when the findings contradict the government? When the research is at the centre of tension between federal and regional governments? When allies in closed-door meetings feel the need to be your adversary in public?

There are no easy answers to such questions, but the work of the Think Tank Initiative's mentors has highlighted at least three principles that think tanks should consider when trying to find their own solution.

“Management in difficult environments will ultimately have to make politically sensitive decisions about whether a research project should be given more or less exposure, but they cannot appear to be doing so for the wrong reasons – and nothing breeds speculation more than silence.”

1) Stay true to the evidence.

Let us admit that even in the most advanced think tanks, formulating policy recommendations from research findings can be more art than science. When researchers, who have little experience formulating recommendations, are pushed to do so by funders seeking to create a Brookings of the South, this can be disastrous.

Research institutions new to the policy influence game must remain vigilant about maintaining the thread between research and recommendations, even if that means making more modest policy proposals. This is especially true in high-stakes environments.

2) Engage early, and discretely, with the government on controversial issues.

For the interest of the institution as well as its researchers, some topics need simply to be avoided. This is the unfortunate reality for many think tanks. But in circumstances when a think tank has chosen to conduct research on a controversial or politicized issue, there is a way to be a “critical friend” to the government. Many of the institutions participating in the Think Tank Initiative agree that engaging the government discretely and from the very start of the research is the best approach. More often than not, this approach will eventually win over one or two sympathetic allies to the value of doing independent, methodologically sound research on the topic.

But early and honest engagement does carry its own risks: it can make the research vulnerable to political pressure and it can create demand for findings before they are ready. However, on balance, these are arguably better than the alternative – to surprise the government with a big-splash media event that presents findings critical of government and its policies.

3) Internal transparency is paramount.

One of the most interesting issues to arise from the experience of mentors is how a move toward more policy involvement by a think tank can kindle internal divisions, mistrust and strife within an organization. Management in difficult environments will ultimately have to make politically sensitive decisions about whether a research project should be given more or less exposure, but they cannot appear to be doing so for the wrong reasons – and nothing breeds speculation more than silence. Even saying “this topic is too hot to go public” is better than saying nothing at all. How this transition phase is managed internally is a topic worthy of a guidebook all to itself.



Nick Benequista reviews a publications process with KIPPRA staff.

“A clear understanding of who needs to hear the message allows us to be more targeted in our approach – which greatly increases our changes of successful coverage.”

Engaging the Media - Part One

Author: Paula Fray, Mentor

It is true that powerful, earth-shattering research needs to be presented as simply as possible for a storyteller or reporter. But more nuanced, issue-based research reports, with incremental changes and contributions to ongoing debates, also need to be packaged and delivered in accessible and strategic ways. This can happen by asking four critical questions:

1) Who is the target audience?

The media we target to disseminate research is simply a channel to reach the target audience. We therefore need to consider who that audience is and how they read, listen and speak. Through identifying these key communication elements, we can then craft a message that reaches them powerfully, evades skepticism, and increases coverage across many sources.

A clear understanding of who needs to hear the message allows us to be more targeted in our approach – which greatly increases our chances of successful coverage. It allows us to identify the media which reaches the target audience most effectively, craft a message that considers their interests and concerns and provide supporting documentation for skepticism.

2) Where do these target audiences usually get their information?

Research reaches out to a wide range of potential audiences. We might want to inform research participants of progress in research, promote the findings to other academics, advocate by reaching out to policy makers, politicians and government officials, solicit support from funders, or raise awareness of the general public.

Media platforms, particularly print, radio, television and online, are used by audience groups for various needs and purposes connected to ease of accessibility, value and fit. Therefore, each platform approaches storytelling differently and may play a role in determining how to tell stories.

- **Print Media:** Print media is positioned as a main influencer in framing news given its increasing role in setting the agenda for what is discussed on other media such as radio and television. As print media gets picked up by other media platforms, it reaches an audience that

is not only literate but one that can also afford subscription fees. While this fee structure may seem limiting, print media's long-shelf life and ability to capture complexity, context and detail still makes it a desirable media.

- **Radio and Television:** While radio is a free platform, apart from its initial cost of purchase, it is increasingly becoming a background activity. We listen to the radio while we complete other tasks including driving or cleaning. And if we miss the broadcast, we miss the information. But radio is accessible, interactive and engages large numbers of people in simultaneous conversation. Through television, on the other hand, we do not just hear a story but can also visualize it. This makes television a more powerful medium preferred by many.
- **Online:** Access to electricity has broadened access to television and the internet. The internet provides a direct and much faster route to news. Social media particularly allows for relationships with existing audiences to be interactive and direct while building relationships with new audiences.

What information is needed across media channels? What would they define as interesting or important?

Let's consider at the start, the definition of news. The Collins Concise Dictionary defines news as: "Important or interesting recent happenings; information about such events as in the mass media; interesting or important information not previously known."

Few research-specific stories have universal appeal and these are generally event-based. For example, the release of research results with significant findings, a contradictory finding, or controversial view. Most of the time, however, research is issue-based and the new information is difficult to find. "Interesting or important information not previously known..." is often in the eye of the beholder. Research takes long to appear in the public domain and therefore runs the risk of becoming old news.

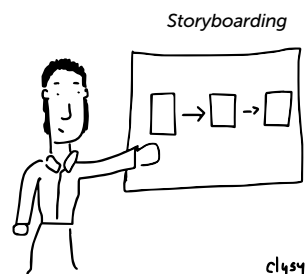
Moreover, a long detailed analysis will work well on print media but not on radio or social media. The question which then emerges is when do we need detail, graphics, photographs, audio, or video? In answering this, consider the differences between what each of these channels and research emphasizes in terms of people, controversy, facts, questions, solutions, and supporting documentation as well as the available space and pace of timing they each operate.

How do they want to engage with and act upon that information?

It is no longer sufficient to simply produce research. We need to package and deliver research so that the target audience – the journalists and ultimately their readers, viewers and listeners – care enough about the information to repurpose it in useful ways.

Engaging the Media - Part Two

Author: Kudzai Makombe, Mentor



Storyboarding

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Before you pitch your story idea, consider the following:

- Do some research to support your story idea. Don't assume your story has not been covered before;
- Talk to a few sources to get a better idea of what the story is about;
- Consider what you want to find out that will make the story;
- Ask yourself some questions
 - What is new/fresh about this story?
 - Who is your audience and why would they be interested in this story?
 - What are some of the questions you would ask sources?
 - Who are the potential sources for this story?
 - Is there a way you can complement the story, for example with graphics or fast facts as a sidebar?
 - How long will it take to develop the story?

When you're pitching:

- Keep it short and simple;
- Don't send your pitch as an attachment – place it in the body of the email;
- Imagine what you would say in a 140 character tweet to tempt the reader. Use this as the first line of your pitch;
- Your pitch can be one to four (short) paragraphs but never more;
- Use words that suggest something new or a problem but don't exaggerate the truth;
- Provide a summary of your proposed sources;
- Polish your pitch – check facts, spelling, grammar and layout;
- If your pitch is timebound say so;
- Include your phone number.

When you're developing your story:

Language and Style

- Use simple direct language. Stories should be written in a clear concise style with simple sentence structure and short sentences;
- One idea per paragraph;
- Paragraphs should be no longer than four lines;
- Think about your audience and what they would want to know;
- Decide who the face of your story will be;
- Substantiate – quote an expert in the know or a research document;
- Include descriptive scenes;
- Quote a minimum of three sources. These could be:
 - The person affected by the issue;
 - The person effecting the issue;
 - An expert or independent source to shed light on the issue.

The Lead

- The traditional lead reflects the story's most relevant aspect and should grab the readers attention;
- It should be short and the meaning must come across clearly in one reading;

- The lead can also be a way of enticing the reader to go beyond the first line -- for example, by providing only limited information;
- Avoid overly general, abstract or summary type information that sounds like a boring thesis statement.

The Body

The lead and body must follow a logical train of thought. The body should tell the story.

The Conclusion

- The ending should reinforce the story's essence;
- Some advice for ending the story:
 - echo and strengthen the opening;
 - save a vital fact for last;
 - provide an unexpected turn of events.

Source: *Climate Governance in Africa: a handbook for journalists, IPS Africa/HBF Southern Africa, 2013*

Interviewing with the Media

Author: Kudzai Makombe, Mentor

Media Interview Tips

1. Know your message and keep going back to it. Use every opportunity to get your message in clearly without using jargon.
2. Never say “no comment.” This invites suspicion and leads reporters to wonder if you are hiding something. Rather, you can say,
 - a. This is what I know and I will be glad to tell you;
 - b. I don’t know but I can help you to find out;
 - c. I cannot answer that question because the information is confidential (for example the name of a patient and his or her condition).
3. Don’t argue with reporters. Try to create a civil environment for the interview.
4. Anticipate questions and practice answers. You should almost never be caught off guard or surprised.
5. If you are going on television, watch the programme ahead of time to see the reporter’s interview style (aggressive, leading, open) and even to know how the furniture is positioned and the colour scheme.
6. If you are asked more than one question in one, answer the one you like and ignore the rest. If the reporter/presenter really wants to know he or she will ask again.
7. What comes across on television most is your body language (55%), the tone of your voice (47%) and your choice of words (7%)* so make sure your body language and tone of voice are confident but not in an aggressive or arrogant way and that you are well prepared and can articulate your issue in a knowledgeable manner.

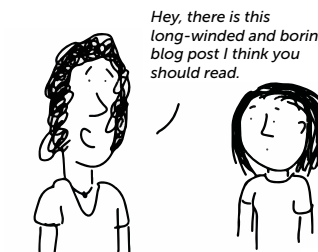
Adapted from Women in the news: Strengthening the Voice and Visibility of Women in the African media’s Coverage of Elections, Politics and Governance, IPS, 2008

** Susan Peterson Productions*

Social Media: Procedures and Policies

Author: Betty Paton, PEC Program Team

Things that don’t happen...



Below are some basic rules and regulations for organizational Twitter accounts. These can be tailored to suit your own organizational needs.

1. You should not disclose any confidential or proprietary information about [the organization] through any social networking account. If you are unsure about whether a blog, tweet, post, comment or photo is acceptable, always consult your manager. Inform your line manager of any blogs (personal or professional) to which you regularly contribute.
2. When posting as [the organization], maintain a professional tone-of-voice and manner at all times.
3. The organisation] encourages you to write knowledgeably, accurately, and using appropriate professionalism. Despite disclaimers, your Web interaction can result in members of the public forming opinions about your company and its employees, partners and products.
4. Plagiarism applies online as well as in print. Organizational logos may not be used without written consent.
5. Respect copyright laws, and always reference or cite sources appropriately.
6. If you create an account on a social media site that mentions [the organization] and/or our current and potential clients, employees, partners, competitors, YOU MUST identify that you are an employee of the company and that views expressed on the blog or network are your alone and do not represent the views of the company.
7. You are responsible for what you write and must exercise good judgment and common sense. You should refrain from comments that can be interpreted as slurs and are demeaning, inflammatory, etc.
8. You must not publish any views that are racist, or otherwise discriminatory or offensive.
9. Your online presence reflects [the organization]. Be aware that your actions captured via images, posts or comments can reflect that of [the organization].



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Developing Key Messages

Author: Kudzai Makombe, Mentor

Frames are ways of thinking or reasoning that shape the way we see the world. These ways of thinking are based on deeply held moral values that guide our thinking about ourselves and our behaviour as individuals or society. At issue are shared meanings for concepts like “freedom,” “justice,” “community,” “success,” “citizenship,” and “responsibility” among others. These are among the values that drive us to communal action.

As such, reframing is communications -- how we express something in a particular type of language to make people understand what we are talking about. Communication resonates with people’s deeply held values and worldviews, it is frame-based and, when it is effective, people can see an issue from a different perspective.

New language is required for new frames.

The news media, as the main source of information about public affairs, plays an important role in framing issues. Media doesn’t simply tell us what to think about, it tells us how to think about issues. In this way, it dramatically influences what issues the public and their policymakers will address.

News coverage influences:

- What issues people think are important for government to address (agenda-setting)
- The lens through which people interpret issues (framing), and
- What information will prove relevant for social and political judgments?

Understanding framing is therefore critical to advocacy. Often, gaining public support on an advocacy issue requires reframing of that issue to a new shared meaning. An example is corrupt practices, often viewed by citizens as fixed and uncontested because they are embedded in institutional practices and everyday lives. Reframing, when done correctly can raise your issue to agenda status by qualifying it as a social or public problem or issue. In considering how you want to reframe your advocacy issue for maximum impact, consider the following:

Context

Context establishes the cause of the problem and who is responsible for solving it. In establishing the context, you must be strategic in identifying the problem or issue as one that affects community as a whole and not just individuals. An example is domestic violence. People may be sympathetic to victims but they are also likely to view it as someone else’s personal problem that does not affect them. It is therefore important to provide the broader context, for example insufficient allocation of state resources for training police officers to handle domestic violence cases, women’s economic status, cultural practices and others. In establishing the context of the problem you also need to assign responsibility for the problem, respond to the question “what will happen if nothing is done?” and present a solution.

Data

Data is useful for illustrating the magnitude of a problem but sometimes figures put people off because they may be difficult to interpret or they may make a problem seem too large to tackle. Again, using the example of corruption, we can detail the millions of dollars lost as a result of just one case of corruption, but these figures have to be combined with narrative in order for people to understand what the figures mean and the cost to society of ignoring the problem.

Messengers

The choice of spokesperson for your message when reframing an issue must be made carefully so that there is no mismatch between the message and the messenger. The public is likely to be more willing to listen to someone they believe is credible and has the knowledge and expertise on the issue than a popular public figure. They may also mistrust certain spokespersons if they think they have a vested personal interest in the advocacy campaign or “extreme” views on the subject. You may want to consider unlikely allies.

Visuals

Selection and use of imagery can reinforce or undermine your message. The traditional use of video or still images of wife battering or a bruised and bleeding battered woman, for example, can have the effect of making gender based violence appear as a personal rather than a public problem, reinforce stereotypes or lead the public to see the problem as hopeless because the visual does not provide solutions.

Rather select images that suggest the public nature of the problem and which demonstrate cause and effect. Even the way you place the picture can make a difference to how it is perceived in relation to your message. Play with the layout of your images and see where the placement has the greatest impact in illustrating your message.

Tone

It is better to have a “reasonable” tone for your message. This is more likely to open people up to your ideas than a “rhetorical” tone, which raises images of partisan politics in most people’s minds and can lead them to dismiss your message.

A reasonable tone will encourage people to think about the problem and the solution rather than whether the spokesperson has a hidden agenda. A reasonable tone requires that you focus on the policy or action that is a part of the identified problem and not on individuals; on solutions rather than problems; and on how it violates fundamental principles that people hold.

Metaphors

Metaphors are useful for simplifying an idea so the public can easily visualise and identify with it. An example is the commonly used and graphic metaphor of planeloads of passengers, as in “the numbers of women who die in Africa each year as a result of childbirth related complications is equivalent to X numbers of full passenger plane crashes.”

Sources: *IPS Africa Advocacy Toolkit for Women, 2011 and FrameWorks Institute, Framing Public Issues, 2005, www.frameworksinstitute.org*

Branding

Author: Mame Annan-Brown, Chief Communications Officer at R4D, PEC Program Team

In its simplest form your “brand” stands for your reputation. Your brand is “not” your name, logo or tagline, but a combination of emotions and facts about your organization. The best brands are defined by clarity of purpose.

8-step guide to building your brand

Step 1: Ask the hard questions

- Is it no longer relevant to your core audience?
- Is it no longer relevant to your ethos, mission?
- Is it causing you to lose bids?
- Is it stopping you from winning new partnerships?
- Have you outgrown it?
- Are you unsure of what it stands for?
- Is it no longer giving you a distinct identity?
- Is it looking tired against the competition or just in isolation?

Step 2: Decide what “type” of rebrand you need

- Partial rebrand: Simple changes to the your logo the leave it recognizable stakeholders while attracting new ones.
- Full rebrand: Major changes to the visual identity, and public image or your organization.

Step 3: Build buy-in and identify needed changes

You can conduct research on several levels to identify the specific changes that your company needs to make to re-brand.

- Poll employees
- Ask for feedback from external stakeholders
- Conduct research using surveys or focus groups
- Get leadership on board by sharing outcomes of these surveys

Step 4: Assess your brand assets

- Mission statement
- Value proposition
- Key audiences
- Organizational values
- What your brand stands for now
- What you want it to stand for
- Elevator speech

Step 5: Build your team

- Build internal team: Identify people in your organization who have influence and who can help you drive through decisions, e.g. your CEO, Executive Director or Board Chair.
- Build external team - TOR/RFP process
 - Set a realistic budget and timeline based on other think tanks’ projects.
 - Give yourself 1-3 months to source RFPs – source at least 4 prospect vendors.

Step 6: Create a project plan and execute

- Create a project plan jointly with your internal team and/or external agency you choose.
- Closely manage the project plan and communicate to staff the high-level timeline.
- Consult with your internal team, as needed, along the way. Make sure you plan the required touch points to get buy-in and decisions made smoothly.

Step 7: Launch your brand!

- Create an internal roll out-strategy
 - Develop brand launch staff presentation and/or event.
 - Create a knowledge management process.
- Create an external roll-out strategy.
- E-mail communications to external stakeholders.
- Create a “Top 100” list of stakeholders.
- Recruit peers and partners to promote your brand.
- Time your brand launch for a special event – anniversary, major event or convening.

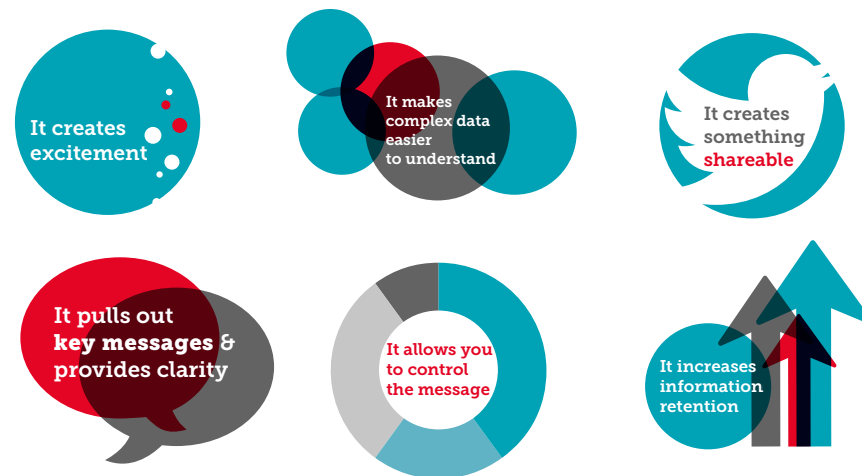
Step 8: Fine tune and review

- Get stakeholder feedback (within 3-6 months of launch).
- Do periodic reviews of your brand assets.
- Periodically step away and return to STEP 1, asking the hard questions.

Data Visualization

Author: Nyasha Musandu, PEC Program Team

Why does data visualization work?



Information can be provided in a number of ways, but make sure it is:
Fit for the Purpose | Clear | Easily Understood | Simple

Reflections from a Mentor: What is your favorite data visualization example?

“My favorite, which never fails to elicit debate and comment is “information is beautiful” detailing where the rich world’s spending priorities are. We still have a lot of work to do in telling the story simply, visually. This was a jaw dropper for me. Other great examples include the Praekelt Foundations data stories. Check them out.” – Kudzai Makombe

Software and Tools

Creately: this is easy to use Online Diagramming software - purpose built for team collaboration.
creately.com

Hohli: this online chart maker is simple to use and allows you to create a range of colourful pie, line scatter, radar and bar charts.
charts.hohli.com

Tableau: a free Windows-only software for creating colourful data visualisations.
tableausoftware.com/public

Gap Minder (Hans Rosling): allows you to upload data and create an interactive chart.
gapminder.org/upload-data/

Many Eyes: allows you to upload data in a range of very versatile formats.
<http://www-958.ibm.com/software/data/cognos/manyeyes>

Google Chart Tools: allows you to include constantly changing research data sourced online.
<http://code.google.com/apis/chart/>

Piktochart: easy to make infographics.
piktochart.com

Additional Resources

[Onthinktanks Data Visualization Library](#)

Reflections on Blogging

Author: Kwame Owino, Executive Director of IEA-Kenya, Think Tank

How do you produce your blogs and what tips or guidelines can you give?

I try to jot down a couple of ideas in advance and then sit down the day before the piece is due to write about it. I usually ensure that I include at least one data reference and therefore check this in advance. Once I have that in, then I usually take an hour aside and make sure that I have the piece done at one go. I will then spend half an hour revising it for clarity and will then send submit.

I also try not to revise too many times or to write about the same subject more than once. My guidelines are therefore to write in a conversational manner, include at least a one data reference, avoid creating too many external links and revise only once.

I think that it is useful to read the responses from readers because this is one of the truly good attributes of blog posts as opposed to conventional opinion articles. In many cases, I get the feedback that shows me that my writing was unclear or the demand for additional data sources. At the same time, the feedback and the quality of responses gives me a rough guide of the quality of the audience. In my assessment, many of the people who read policy blogs are a very high caliber audience.

Do you have some advice to other think tank leaders?

I would certainly recommend blogging to leaders of think tanks and especially on the African continent. Its an opportunity to get an increasingly educated population to participate in policy discourse. I stress this because think tanks may have different ways of influencing policy but public education should be an area of interest as a public good. Each think tank leader must choose subjects, medium or regularity of blogging but on the whole, the feedback and practice in communicating with a lay audience is something that African Think Tanks should start doing.

Additional resources:

<http://www.researchtoaction.org/2014/06/tti-pec-virtual-write-shop-crafting-better-blogs-and-op-eds/>

News and Press Releases: Tips & Tricks

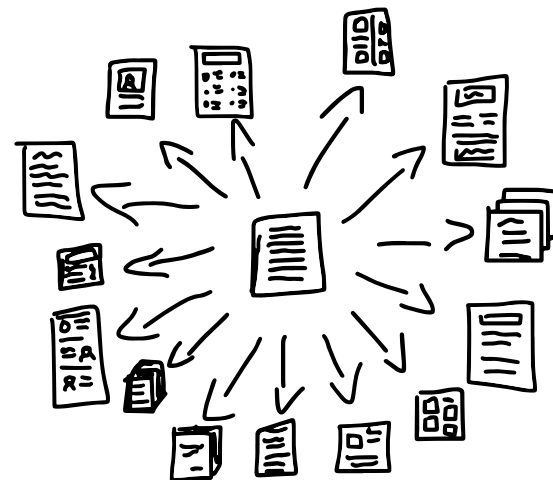
Press releases, news releases, media releases and press statements are all different names for the same basic idea — a written or recorded communication directed at specific target audiences for the purpose of announcing something you deem newsworthy. These audiences can be the news media, donors, supporters, governments and/or other key stakeholders.

Writing News and Press Releases

- Write according to the Inverted pyramid and F-shaped reading pattern → state most important information in first two paragraphs and use buzz keywords in the first line of each sentence
- Be concise – eliminate verbatim and jargon
- Include quotes

How to write catchy headlines? Top Tips From Quick Sprout

- Use numbers
- Use interesting adjectives
- Use unique rationale
- Use what, why, how or when
- Make an audacious promise
- Perfect length is 6 words



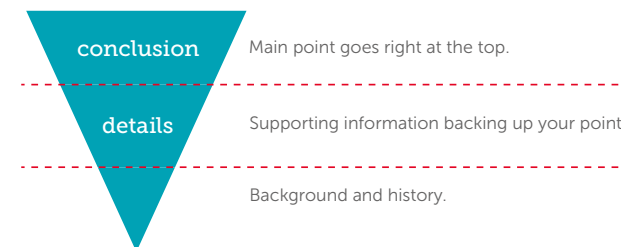
Additional resources:

<http://www.researchtoaction.org/2014/08/tti-pec-virtual-write-shop-writing-news-releases-make-impact/>

Inverted Pyramid

- Catch your readers' attention in the first few words
- Start with the conclusion, follow with the details
- Focus on key facts who, what, where, when, why and how
- Only one idea per paragraph
- Use half the word count of traditional writing

Inverted Pyramid Style of Content



Tips from Mentors

- Explain issues in simple language.
- Invest in developing a relationship with journalists – involve them from the start.
- Include background images, facts, figures.
- Put most of your efforts into writing a lead that summarizes your main point in a way that draws in the reader. - *David Olson*
- If the news release is virtual, be sure to add links to your website and social media. - *David Olson*
- Never send your story idea or press release as an attachment. It is unlikely to be opened because editors have tons of mail every day. Make sure to include your content directly into the body of the email. Make sure it's neatly laid out, spelling is checked and grammar correct, otherwise you will annoy a busy editor. - *Kudzai Makombe*
- Get the editor to notice your press release or story pitch by using an attention-grabbing email subject line. If its not interesting the email will most likely be deleted without ever having been opened. A trick to coming up with an attention grabbing headline is to imagine you are tweeting. If you had to present the essence of your press release or story idea in 140 characters or less what would you say? - *Kudzai Makombe*

Newsletters: Tips & Tricks

Email and print communications (mainly newsletters) are important and growing channels to disseminate messaging and products.

Newsletters can be a significant reputational risk if not done right. Below are tips from think tanks and mentors to help you enhance the content and quality of your newsletters.

Tips From Think Tank Staff

- **Sola Oluwadare, AfriHeritage:** Include your office address and social media handles.
- **Costantine Shiriati, STIPRO:** Insert high quality photos and give enough space for each.
- **Zilper Audi, IEA Kenya:** Consider an e-newsletter over print because it allows you to be brief and draw more traffic to your website. I would suggest Mailchimp – it lets you know how many people you have reached, have read your newsletter, bounce rates, forwards, comments, and much more.

Tips From Mentors and Program Team

- **Gifti Nadi:**
 - Keep font simple and readable
 - Have space evenly distributed so that text does not look too dense
 - Include pullouts with key highlights
 - Use background colors strategically
- **Kudzai Makombe:** Most apps for producing e-newsletters also have tools for assessing reach, click throughs, any comments and other useful information for tracking and M&E purposes. A good rule of thumb is that if you have reached (this includes being opened by) at least 10% of your mailing list then you are doing pretty good. Be rigorous with your housekeeping by removing any bounce-backs from your mailing list and adding new subscribers as you get them.

List of free and low-cost e-newsletter platforms

[Mailchimp](#)

[Campaign Monitor](#)

[Paper.li](#)

[Scoop.it](#)

Additional resources:

<http://www.researchtoaction.org/2014/07/tti-pec-virtual-write-shop-producing-newsletters-people-read/>

• David Olson:

- E-newsletters allow you to display very brief and compelling news summaries (one or two sentences) linked to longer versions on your website.
- Always document your newsletter metrics over time. This is easier to do with an e-newsletter, where you can track in great detail how many people receive, read and share your newsletter.

• Naomi Lucas:

- Define your audience: This is the very first step in any communications-related activity. Who do you want to talk to and where are they located? If you know who they are, you will be in a better position to tailor your content. If you know where they are located, then you can schedule the release of your newsletters at a time when they are sure to see and read your material.
- Determine format and frequency: I recommend e-newsletters on a more frequent basis and a bulkier print publication maybe once or twice a year. The world has gone digital and the way people consume information has changed. To be effective, the format will have to be tailored to suit the lifestyle of those the newsletter is targeted at. I recommend newsletters be sent no more than once every two weeks. If they are published too often, you stand the risk of subscribers unsubscribing or reporting you for spam.
- Pay attention to titles: A majority of online content consumers decide what to read based on titles. If the title looks appealing, if it promises something more, then they are more likely to open the mail or link and vice versa.
- Keep it simple and aesthetically appealing: Try not to lose people by using unnecessary jargon and highfaluting language that does little to advance the cause of the content. Newsletters do not have to be boring. Use pictures and colored text to brighten the look of your newsletters. Ensure all your contact information and social media links are clearly visible wherever you decide to place them. Incorporate “share and follow” buttons (you can find widgets for this on apps like Mailchimp) so people can share your content easily.
- Review feedback: Create a dedicated email address for those who wish to contact you and check your email frequently. Review the analytics provided by most email service software and apps. Take note of the kind of content users engage with and those they ignore and adjust your strategy based on the feedback you receive.

Policy Briefs

Author: Sue Martin, Mentor

Policy briefs are useful influencing tools for think tanks and research institutions. Along with other short items, such as blogs and newspaper articles, they may be the only items from your organization that busy policymakers will read.

What is a policy brief?

- It is topical - explains and conveys the urgency of an issue
- It presents policy recommendations or implications around an issue
- It provides supporting evidence for your recommendations
- It points the reader to additional resources on the issue
- It helps to bridge the gap between the research and policy community (e.g. between academic specialists and stakeholders with less detailed knowledge).

Who are your target audiences?

- Decision makers with varying levels of expertise, who are often short on time
- Often non-academic and non-specialist
- Not the general public.

Key questions to ask about your brief:

1. What issue(s) does it discuss?
2. Why is it important – to your audiences, to you?
3. What recommendations are you making?
4. Is a policy brief the right vehicle for your argument?
5. Who writes it?

6. Where are your main audiences?
7. How much do they know (or not) about the issue? The brief needs to be in clear simple language, with no jargon, and with any essential technical terms or acronyms explained on first use in the text
8. How receptive is your audience likely to be to your arguments?
9. What questions do they want answered?

Planning your brief

Policy briefs are short, probably four A4 pages at most. Aim for a maximum of 2000 words, fewer if infographics or other visuals are included.

There are two main types of policy brief:

- **An advocacy brief**, which argues in favour of a particular course of action
- **An objective brief**, which sets out balanced information for the reader to make up his or her own mind.

Structure

- Executive statement: (100-150 words). Gives an overview of the purpose and main message of the policy brief, catches the attention of the reader (and is usually written last). Here or in the introduction, establish the author's credentials.
- Introduction: (up to 200 words). Explains why this issue is urgent and/or important. This section should make your audience want to continue reading.
- Key messages (box, optional): usually a maximum of three, one brief sentence for each.
- Methodology: not always needed, but use if:
 - there was something unusual or even unique about your approach, and/ or

- you need to establish a credible base for the recommendations that follow.

- Results and conclusions:
 - Have you constructed a logical line of argument that leads to your recommendations (see next section)?
 - Objectivity – the author should feel free to express opinions but must identify those components that are opinion-based
 - Key evidence – focus on research or results that support your main argument.
- Recommendations or implications:
 - identify up to three key policy recommendations or implications
 - offer clear, strong and coordinated recommendations
 - ensure these are actionable (i.e. linked to specific policy processes, feasible in terms of policy steps to be taken).
- References and useful links: provide a brief list of links to seminal work that's directly relevant. This is also a good opportunity to link to relevant material from your organization.
- Author: in the introduction or a footnote, the brief should show why the author is credible (e.g. qualifications, relevant experience, etc).

Design and Layout

- Proposing titles, headings, and a 'standfirst' (a standfirst is the one line message that often acts as a subtitle for the brief and generates interest)
- Indicating material for text boxes (eg for a brief case study, a checklist etc)
- Providing quotes (check if you need approval to use particular quotes)
- Infographics, such as maps or charts: these should illustrate a key point in the policy brief argument and if they are from an outside source you will need to include © and credits
- Photographs (again, you will need © and credits for images)

Editorial Process and Approval

Each organization will have its own editorial review process. Since policy briefs are intended to be topical and high profile, you may need to move very quickly, and/or involve staff at a more senior level than normal. Possible stages:

- Email the policy brief for review and agreement by senior staff at a late draft stage
- Discussing the level of internal approval needed
- Get another researcher to fact-check the text and visuals
- Final draft to third parties for written approval, with a deadline for response
- Final version then needs to be approved
- You may need a disclaimer, typically something like: 'The views expressed in this publication are those of the author/s and should not be attributed to [your organization] and/or its funders.' NOTE: A disclaimer offers only limited protection. Always check with more senior staff or even a legal expert if your policy brief includes negative opinions about organizations or individuals or is in other ways controversial
- If the author is from outside your organization, check their organization's sign-off procedures – you may need written approval from them to publish or to agree use of their name and brand.

Additional resources:

Policy briefs as a tool for development communication, Jeff Knezovich, ODI, April 2009

Preparing policy briefs, FAO, part of Writing effective reports, FAO's Food Security Communications Toolkit

Reflections on Social Media

Author: Zilper Audi, IEA-Kenya, Think Tank

Twitter, Facebook and other social media channels are excellent for dissemination, outreach and visibility purposes. Most importantly, they allow direct interaction with stakeholders and a direct connection to news (as opposed to going through a third-medium like newspapers) and new partnerships. As you produce content on social media channels, keep in mind the below tips from think tanks and mentors.

In using social media, IEA Kenya has benefited in many ways. We have been sharing our research with our followers, sending direct invites to different people including policy makers, seeing an increase in the number of visitors to the IEA Kenya website, answering pertinent questions asked by our followers and getting new ideas and suggestions on how to improve our work, and thinking about what new research or what events to consider doing for the public. Based on this experience, I have highlighted two basic rules of thumb as you start or continue in your social media activities:

- 1. Keep your audiences in mind:** Different organizations have different missions and target audiences, and therefore different needs. What may work for audience "A" in organization "A", may not necessarily work for audience "A" in organization "B". You need to know the media that your audiences are using, so that your messaging is targeted.
- 2. Don't sign up for everything:** There are different social media sites that an organization can use. This list keeps growing by the day, so be cautious.
- 3. Free market research:** Continue to engage in online discussions, either in tweets, mentions, hash-tags or dedicated live chats. Use these as potential avenues for collecting "market research" on your audiences.
- 4. Content is easy to produce:** Twitter allows one to post a tweet of up to 140 characters. This could be a simple intro or a title of your research, accompanied by a link to the main research, a photo or even a video! That is all you need to pass across your information to your larger online audiences.

- 5. Embed important links:** Embedding Twitter to your website is a sure way to drive traffic to your website, as is adding hyperlinks of your research to your tweets.
- 6. Use Google Analytics:** IEA Kenya tracks its web visits using Google Analytics, and we are able to calculate the visits that come as a result of social media referral, a percentage which has been growing consistently.
- 7. Take advantage of social media applications:** There are various social media management applications like hootsuite, tweet-deck etc, that will help manage your site or even schedule tweets, even when you are away.



Ifediora Amobi and Obinna Anyadike, Editor-in-Chief of IRIN News pose for a picture at the TTIPEC Regional Workshop in Nairobi, Kenya.

Naomi Lucas, Mentor

- Don't spread yourself too thin: Choose wisely;
- Understand your audience (Eyeball rule, geography, time, interests, influences, needs);
- Plan your engagement;
- Keep it active (but don't overload audiences);
- Keep your posts short, punchy and newsy;
- Make use of good images to attract the reader's attention;
- Encourage participation;
- Make use of the monitoring tools;
- Integrate your digital media platforms;
- Encourage the face of your organization use. select social media platforms or grant access for them to be used;
- Budget resources (Human, time, funds);
- Be flexible in your approach.

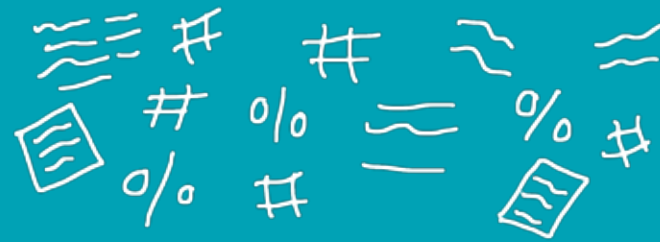


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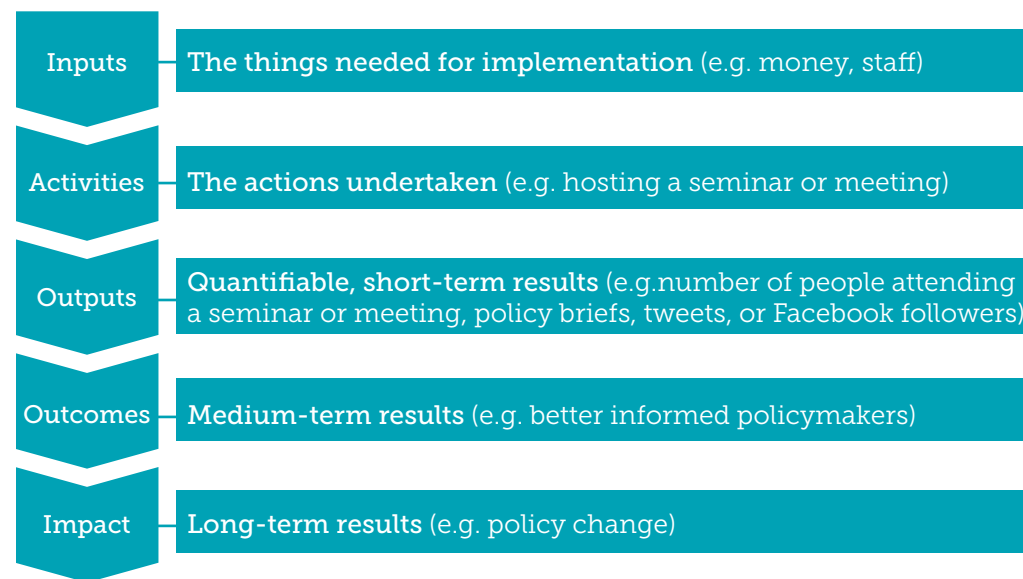
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Monitoring and Evaluation Tools

It is vital to monitor and gather information on the success of your communications activities. It is also equally important to create and establish an agreed-upon monitoring and evaluation process and metrics that can be leveraged and re-used over time. Below are suggested examples of metrics and frameworks to get you thinking on what M&E tool works for you.

Example of a basic results chain



Measurement is often heavily skewed towards outputs and activities as they are easier to measure.

Additional resources:

<http://www.cigionline.org/blogs/tank-treads/communications-and-impact-metrics-think-tanks>

<http://www.odi.org/publications/8265-gates-monitoring-evaluating-advocacy>

Potential Metrics for PEC

Adapted from Communications and Impact Metrics for Think Tanks, CIGI, 2013

1. Exposure (many are outputs)

- Media mentions
- # and type of publications
- Citations
- Government citations or references
- Ratings

2. Resources

- Quality, diversity and stability of funding
- Reputation of researchers
- Influence (e.g. quality and extent of networks)

3. Demand (many are outputs)

- # and quality of events
- Digital traffic
- Official access to policymakers
- # of publications sold / downloaded

4. Policy Impact

- Policy recommendations adopted
- Testimonials and feedback
- Quality of work

Tips from a Mentor

Mo Adefso:

- Communicating research is an exciting process but one that should be approached logically and with intent. Begin by asking what you want your audience to go away with after coming in contact with your communication.
- In any organisation, 'results' differ from 'activities'. Many people when asked what asked about the result of their communications efforts, simply describe instead what they do.

Conclusion

This toolkit consolidates some of the knowledge and resources developed over the course of our PEC work. This guide draws upon material that has been shared on our project website and can help institutionalize some of our approaches and learnings. Please visit our project website for more information:

www.researchtoaction.org/dialogue/policy-engagement-communications/

We hope you find this guide to be a useful resource as you continue your efforts to strengthen your policy engagement and communications work.

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