Toolkit for Developing an Effective Communications and Outreach Plan
This document has been written for the CITIIS
(City Investments To Innovate, Integrate and Sustain)
Program as a tool to develop an effective Communications
and Outreach Plan for urban projects.

Produced by
National Institute of Urban Affairs (NIUA), New Delhi,
through the CITIIS Program Management Unit;

In Collaboration with
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November 2020
Toolkit
for Developing an Effective Communications and Outreach Plan

City Investments To Innovate, Integrate and Sustain

Ministry of Housing and Urban Affairs
Government of India

AFD
Agence Française de Développement

European Union

Smart City

National Institute of Urban Affairs
National Institute of Urban Affairs (NIUA) under its CITIIS (City Investments to Innovate, Integrate and Sustain) program, a joint program of Ministry of Housing and Urban Affairs (MoHUA), Agence Francaise de Développement (AFD), European Union (EU), has partnered with 12 cities across the country to facilitate integration, innovation and sustainability in implementation of urban infrastructure projects through a participatory approach.

Rooted in a participatory planning approach, the CITIIS program is piloting the creation of an enabling environment that would effectively and efficiently reflect upon citizens’ aspirations. For this to happen, it is critical for local governments and implementation agencies to ensure effective communication with their citizenry, to inform, inspire, and engage them throughout the life cycle of the project.

Based on the learnings, CITIIS project team has developed a toolkit, which provides a step-by-step approach of preparing a communications plan, and lays guidelines for developing, executing, documenting, and evaluating a communications strategy. The toolkit also looks at specific information products such as press reports, memorandums, comments cards, factsheets, and suggests ways to structure and improve them. A section focuses on writing effectively, which focuses on grammar and style, makes sure that written documents are easy to read.

Finally, the toolkit gives tips for using the internet, specifically the social media, as these technologies offer unprecedented opportunities for engaging in two way dialogues with global audiences. The toolkit also includes readymade templates and dozens of tips and tricks distilled from primary and secondary sources.

I am affirmative that this toolkit will be useful for all urban practitioners in holistic planning, design and implementation of urban development projects, along with capitalizing the opportunity of enhancing learnings from different project interventions.

Hitesh Vaidya
Director – NIUA
### Contents

1. **INTRODUCTION** ..........................1
   - What is a COP? .................................................................1
   - Why do we need a COP? ....................................................1
   - When should you implement it? .........................................2
   - Purpose of this toolkit ....................................................3

2. **CORE VALUES OF A COP** .............5

3. **STRATEGY | Developing a plan for communication and outreach** ......9
   - Components of a strong COP ...........................................9

4. **EXECUTION | Communication and Public Engagement Tools** ...........13
   - Four types of communication and public engagement tools .........13
   - Ready reckoner tips for creating communications content ..........13

5. **Documentation** ............................25

6. **Evaluation** ....................................31

7. **Annexures** .................................35
   1. Template for a COP document .........................................37
   2. Sample Work Plan for a COP ..........................................39
   4. Sample monthly event calendar - distribution of activities that make up a COP ....42
Introduction
1. WHAT IS A COP?

Communication is a crucial process embedded into every stage of a project’s life cycle - from conceptualisation and design, through implementation, until and even beyond the closure of the project.

Tools and techniques by which you reach and deliver your message to those critical audiences and engage with them.

A COP encompasses different strategies used to educate, engage and involve various stakeholders around the objectives of a project in order to ensure its succeeds in a measurable way.
2. WHY DO WE NEED A COP?

Considering the multifaceted nature of large scale and complex urban projects that involve multi-functional stakeholder interests and influence on the project, a COP makes it possible to strategize and guide all communication activities accurately. It assists in mapping out the project profile and objectives, defining target groups, and planning for activities to be undertaken, as well as deciding on the tools and channels that you will deploy in the process.

**Short term benefits of a COP**

- Engaging tools and techniques raise public awareness on key issues and/or objectives that the project is seeking to address.
- Seeking valuable input on needs, concerns and aspirations of different user groups leads to co-creation which ensures enhanced design solutions.
- Involving citizens leads to change in attitudes which is often a precursor to long term behaviour change.
- Ensures smooth implementation with minimized and/or mitigated risks.
- Ensures good patronage of the project post-implementation.

**Long term benefits/outcomes of a COP**

- Ensures transparency of the project objectives to the funders, influencers and beneficiaries by providing balanced and objective information to assist it in the understanding of the project.
- Helps avert crises/risks and subsequent course correction.
- User centered design ensures that everyone’s concerns and aspirations are consistently understood and considered, which leads to holistic and efficient design solutions most suited for the end users.
- Helps to build community support for the project with a focus on the long-term gains and in turn ensures behavioural change.
- Helps foster an improved sense of ownership and pride among stakeholders.
Difference between Stakeholder Engagement Plan (SEP), Project Management Plan (PMP), and COP

**STAKEHOLDER ENGAGEMENT PLAN**

Engagement for:
- Information dissemination;
- Collaborative activities;
- Design input; and
- Implementation

**PROJECT MANAGEMENT PLAN**

- Successful development and management of the project’s procedures of initiation, planning, implementation, regulation and closure
- Guidance of the project team’s operations towards achieving all the agreed upon goals within the set scope, time, quality and budget standards

**COMMUNICATIONS AND OUTREACH PLAN**

- A COP is an action plan that effectively aids the SEP and PMP
- To reach out and communicate with various target audiences using engaging tools and techniques.
- To create better awareness about the project and arrive at enhanced design solutions catering to the needs of the stakeholders.
- To arrive at enhanced solutions for smooth implementation and support for O&M post-implementation.
3. WHEN SHOULD YOU IMPLEMENT IT?

The CITIIS program’s maturation framework specifies that the COP needs to be prepared in the fifth quarter/ final leg of the project maturation phase in time for a full-on deployment during the project implementation phase. It is to be noted however that the activities related to stakeholder engagement as well as the environmental & social impact assessment that feature in the second, third and fourth quarters are to be treated as precursors to the COP.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Structuring</strong></td>
<td>Maturation Roadmap</td>
<td>Baseline Study and Report</td>
<td>Feasibility Study</td>
<td>Finalised PLF Detailed Project Report</td>
</tr>
<tr>
<td><strong>SH Engagement</strong></td>
<td>Mapping and contact Identification</td>
<td>Stakeholder Engagement Plan</td>
<td>Workshop on Co-design of Scenarios with Stakeholders</td>
<td>Workshop on Scenario Selection with CLAF</td>
</tr>
<tr>
<td><strong>Capacity Enhancement</strong></td>
<td>Organisational Readiness SPV Staffing Plan</td>
<td>Recruitment of SPV Staff</td>
<td>Training Workshops supported by the PMU</td>
<td>Additional Training Needs Assessment</td>
</tr>
<tr>
<td></td>
<td>Innovation, Climate Change WS</td>
<td>Workshop on Co-design/Validation of a Quick Win Project</td>
<td>Quick-Win Pilot Project</td>
<td>Maturation Report</td>
</tr>
</tbody>
</table>

Maturation Framework table for the CITIIS Program

4. PURPOSE OF THIS TOOLKIT

Communication plays a key role in urban projects and provides an opportunity for local governments to raise public awareness, gain support by engaging community members, promote successes, deliver calls for action, and inspire behavioural change. Considering the diversity of contents communicated to varied target groups through diverse channels, the complex process of communication requires careful planning and implementation.
Recognising this need, the National Institute of Urban Affairs, New Delhi through the CITIIIS Program collaborated with Urban Design Collective, Chennai to create this Toolkit on Developing an Effective Communications and Outreach Plan (hereafter, COP). This tool kit acts as a blueprint for better and clear planning and execution of communication and outreach programs.

It includes guidelines for strategy, execution, documentation and evaluation phases of the COP for effective and desirable outcomes, and has been specifically tailored for projects under the CITIIIS Program.

The toolkit may be used by local governments and implementation agencies in urban areas to carry out their communication activities more effectively, inform, inspire, and engage their citizenry in projects. The contents are not binding, and the user of this document should be aware of their program-specific requirements.

WHAT - the Toolkit presents important information on how to lay the groundwork and use communication avenues to reach out to the target stakeholder groups, tools and methods that may be deployed, the plan for implementation, evaluation and course correction.

WHO - this guide acts as a resource for local governments interested in engaging their citizenry in the city’s development efforts.

WHY - the successful implementation of an urban development project involves concerted efforts from the local government as well as from local communities, meaning that for sustained change it is important to engage, motivate, and inspire citizens to participate.
Core Values of a COP
Core values of a COP

- User Centered Design Approach
- Collaboration
- Conversation
- Transparency
- Consistency
- Curation
- Content
User Centered Design Approach

User Centered Design is an iterative design process in which designers focus on the users and their needs in each phase of the design process. In UCD, design teams involve users throughout the design process via a variety of research and design techniques, to create highly usable and accessible products, services and systems for them. It is about cultivating deep empathy with the people you’re designing for; generating ideas; building a bunch of prototypes; sharing what you’ve made with the people you’re designing for; and eventually, putting your innovative new solution out in the world.

For more insight on the process, refer to the Pocket Reference Book for User Centered Design published by CITIIS PMU at NIUA.

Collaboration

Communication and outreach plan emphasises on collaboration as a value whereby individuals or various stakeholders work together for a common purpose to achieve the desired benefit. It enables sharing of ideas, thoughts, files and documents using various communication tools and techniques. It brings the goals of the project in the forefront and helps in engaging with the stakeholders and get their response.

Conversation

It is an interactive communication that results in exchange of news and ideas. The focus of the creating a communication and outreach plan is to bring people together in the community to discuss items of common interest and to engage in conversations with them regarding the goals and objectives of the project. It enables the message to reach a much wider audience through various platforms and get diverse responses based on the strategies. It is of prime importance to have a dialogue/ conversation with the stakeholders involved or affected due to the project for its success.
**Consistency**

The communication and outreach plan is not a single-stage process. It involves a multi-level approach amongst stakeholders and executors. Consistency is the key to getting desired results from the strategies and its implementations. Public participatory approach not just requires consistency while the communication tools are implemented but also requires consistency in following up on the evaluation, informing the stakeholders about the progress of the project and consistent being in contact with the stakeholders to hold their interest and attention towards the project.

**Transparency**

Transparency of the goals, objectives, purpose of the project to its stakeholders is very crucial to gain their confidence. Openness of information in a public participatory approach serves different purposes, it creates awareness of the decision makers for public insight and influence. It prevents confusions that may arise due to underlying assumptions or spread of wrong word regarding the project. It helps in creating a bond between the people involved in the project with the other stakeholders enabling a strong interaction and communication.

**Curation**

Curation means organizing and maintaining a database or a collection of information works and entertainment artefacts. It is essential to decide what content is important and should be shared and discussed. During the plan, a participant’s role is frequently shifted from the gatekeeping of information to gate watching or curating. It is a vital value in the entire process to prevent the efforts from going futile and helping us achieve the desired and useful output. It also helps in effectively disseminating the information among other stakeholders and participants as well.

**Content**

Sharing and using valuable content to attract the attention of a larger audience and to eventually spread the message. The quality and clarity of content defines the reach and success of delivering the key message and objectives of the project amongst its stakeholders.
Strategy
Developing a plan for Communication and outreach
1. Components of a strong COP

Lay the Groundwork

1. Review your project’s vision and objectives - Understanding the overall project aims is key to identify how communication will be organised;

2. Key message: Prepare an introduction about the project and include it in the COP while drafting the document;

3. Define Communication Goals and Objectives: Objectives of the communication strategy can be defined by doing a SWOT analysis of the project, in the context of communication. Ask questions!
   - What have we got that we can use? (STRENGTH)
   - What could be a deterrent to our project communication? (WEAKNESS)
   - What can we capitalise on? (OPPORTUNITY)
   - What might go wrong? (THREAT)

4. Identify the Target audience: This will help you identify what messages you want to deliver, how and through which channels. For the CITIIS project, go back and refer to the Stakeholder Mapping and Stakeholder Engagement Plan documents to access this information. Generally, you may want to define your stakeholder groups into Primary and Secondary Stakeholders. Primary stakeholders are the most important audiences you primarily want to reach out to, meaning end users or beneficiaries of the project, meaning the groups that have a high impact and high influence on the project. While secondary target groups are ones that play an indirect role in the project.

5. Assemble a core team: Involve your team members in setting up the communications strategy. For the CITIIS projects, this would mean involving the project incharge, Environmental and Social Nodal Officer, International Mentor and Domestic Expert, as well as the Project Management Consultant team in internal consultations. Inform them about your SWOT analysis and get their inputs. You could also explore the option of involving the team in the SWOT process.

6. Define roles and responsibilities: The Public Engagement Officer would lead and steer all communication and outreach activities in a project. However, it is advised to put a support team in place to assist in operationalising the communication strategy. The PEPO shall clearly list down the assistance needed in this regard, and map out persons in the team that can be on boarded on the communications team. In addition to this, if the project involves multi-department coordination, the PEPO shall identify resource persons in each department and ensure that
those persons are on boarded on the communications team.

7. **Check for resources available and create a budget:** Under the CITIIS program, all SPVs may utilise a minimum of 2 per cent of the total project costs for communication programs in order to enhance the participatory, outreach and visibility aspects of the project. Using this budget estimate, the PEPO may prepare a detailed budget, mentioning all the lines of expenditure on communications and associated timeline of expenditure. This shall be a part of the COP prepared for the project.

Please refer to Clause 6 of the Tripartite Agreement signed between the Ministry of Housing and Urban Affairs – Government of India, the State Government, and the Smart City SPV.

8. **Identify communication tools:** Define tools and activities that you will use in addressing your target groups to achieve your objectives and identify the best channels that you would use to reach each target group. The choice of the communication channel should be made depending on the following.

- The nature and type of audience
- The message to be conveyed (information, or consultation, or feedback)
- Cost-effectiveness of the channel
- Scale of intended outreach

In nutshell, the channel chosen should match the message to be conveyed.

*As an example, in case you wish to announce a stakeholder consultation, you may use the radio as a medium to inform people about the event, and call for questions/feedback. However, radio may not be the best channel in cases where you want to convey technical information about a project, as it is hard for the audience to remember technical details on radio.*

9. **Workbook for various events with specified time period:** arrive at a clear methodology to execute each activity within a specified time frame

**Target Audience**

- Conduct an intensive study of stake holders to set priorities in communication efforts (refer SEP);
- Identify key audience who should receive the project information;
- Know your secondary audience too – those who are not targeted directly but are likely to hear the message second hand; and
- All categories of stakeholders must be considered in COP for effective and accurate spread of messages.
Tools and techniques

- Identify specific actions, activities and communications tools to use to communicate with various stakeholders
- The most effective approaches will target a specific stakeholder group(s) and ensure increase in the number of times these key audiences hear your messages
- Use regional languages to connect with the local communities

Implementation

- Develop a timeline and budget for identified communications and public engagement tools.
- Plan for the implementation of various tools during the overall CITIIS matrix/timeline

Documentation

- Diligently compile and assess information/feedback received to improve and enhance the results of the COP
- Do focus on consistent evaluation and rectification

Please refer to Annexure -1 for a checklist on contents of a COP document.

Please refer to Annexure -2 for a sample worksheet on preparing a strategy for communication.

Please refer to Annexure -4 for a sample monthly event calendar showing the distribution of activities that make up a communications and outreach plan.
Execution
Communication and public engagement tools
1. Four types of communication and public engagement tools

- **Website**
- **Social Media**
- **E-News Letter**
- **Email Update**
- **Text Alerts**
- **Website**
- **Social Media**
- **E-News Letter**
- **Email Update**
- **Text Alerts**

**Communication and Public Engagement Tools**

- **Mailed Invitation**
- **Comment Cards**
- **Briefing Memorandums**
- **Fact Sheets**
- **Commentaries, Op-Eds, Letters to Editors**
- **Paid Media**  
  - Eg, News Paper Ads
- **Media Interviews, Background Briefings**  
  - Newspaper, Radio
- **Press Releases**
- **Input Meetings**
- **Public Hearings**
- **Presentations to Civic Organisation**
- **Website**
- **Social Media**
- **E-News Letter**
- **Email Update**
- **Text Alerts**

**Things to keep in mind**

- Create opportunities for sustaining the communication
- Offer multiple opportunities for public to communicate back to the agency (survey, online forms, meetings, reviews etc.)
- Show progress, new information and actions taken as proactively and quickly as possible
- Follow up on the commitments made and ask for feedback
- Recognize and thank the partners and collaborating stakeholders for their efforts
- Expand opportunities for sustained interaction to maximise communication
- Develop a healthy working relationship with reporters
- Provide only key information to media which can be helpful to the audience
- Communicate progress points and key inputs that are considered
- Share media coverage with priority stakeholders
- Be consistent in communication approach
- Keep a record of the information/data collected
- Organise the work you do
- Use of regional language to deliver the message to the local people
- Regular team meetings and discussions will help in enhancing the output
- Plan for the event well in advance for planned execution
- Modify the schedule of required for better results / time availability of a particular stakeholder
- Use major public events in the favour of the project to spread the message
- Gather qualitative data through surveys, interviews, focus groups or informal channels
2. Ready reckoner tips for creating communications content

How to use social media?
An effective social media content strategy consists of the following elements:

1. **Identify and set goals** - Set your content goals and start planning out the type of content to create.

2. **Plan your social content** - With the help of social media management platform like Sprout Social, you can look at all of your social media data and analytics in one place. You can use Sprout’s Report Builder for a holistic view of how all of your social media content is performing. Agora pulse can help you schedule your social media updates, while also providing a full view of your social media calendar.

3. **Use visuals to tell your brand story** - The key to deliver the best accurately is transparency. Keep it simple and visually interesting to grab attention and convey the project message effectively. Things that can be shared are blog posts, videos, graphics, brochures, news announcements, events documentation, photos, infographics, customer testimonials etc.

4. **Build a content calendar** - It will help you visualize your ideas and organize them in a way that makes the strategy easier to execute.

5. **Promote and distribute your content** - A good strategy involves finding ways to actively distribute your content so that as many people as possible see it. When you track these types of mentions, you’ll expand your opportunities - for example, tracking these mentions can help you to:
   - reply to the responses
   - identify potential leads for your strategy / project
   - identify people’s perspectives and expectations
   - document and compile the output

6. **Measure results** - Proper tracking is going to be vital to creating a strategy with longevity. Keeping detailed metrics will help you tweak and optimize your plan over time. Assess how well the content contributed to the overall content goals that you set in step one. A robust social media analytics tool that you can use for measuring your results is Keyhole.co. Keyhole can help you to track your campaign hashtags, keywords, usernames or URLs, while also providing more in-depth analytic insights.

7. **Putting it all together** - Plan out your process with the ideas above and stick to these essential steps to develop content planning that puts a strategic approach first.

**Things to keep in mind**

- How Often to Post On Social Media?
- What are you trying to achieve through social media?
- The Best Times to Post on Social Media
- Setting Up a Successful Social Media Posting Schedule
- Using Hashtags, the Best Way
- Scheduling Social Media Content Curation for Massive Growth
How to make a good presentation?

- Have you identified your aims i.e. the topic and goal of your presentation?
- Have you identified and understood your audience?
- Do you know how much time you have for the presentation?
- Have you familiarized yourself with your material?
- Have you decided on format and structure?
- Is it set out in a logical manner?
- Have you included a summary?
- Have you anticipated and prepared for the questions?
- Are presentation aids clear and legible?
- Have you checked your slides for grammar and spelling?
- Are handouts clear and legible?
- Do you have enough copies of handouts?
- Are you using technology?
- If you are using technology, is equipment already set up?
- Are you familiar with how technology works?
- Do you have a contingency plan if the technology breaks down?
- Is the seating arranged effectively? Can all participants see you?
- Do you have a contact person at your presentation in case of emergencies?
- Do you have enough time to warm up and calm your nerves?

How to make a video?

A video consists of the four components as a basic structure

- **Opener** - The opener needs to grab your viewer’s attention immediately. It needs to intrigue them and encourage them to keep watching. Aim to establish a sense of urgency or mystery in your opener.
- **Problem Statement** - The problem statement outlines the major objective that the video needs to convey. As you determine the scope of your problem statement, be thoughtful of who your target audience is.
- **Solution** - You’ve hooked the viewers with an intriguing opener. Then you connected with them by recognizing their problem. Now is the time to show the viewer how your product can solve their specific problem.
- **Call to Action** - The call to action is where you literally call the watcher to take action: by filling out a lead form, visiting your website, or provoke them to comment / respond.

8 Steps for Creating an effective video

1. Establish a Timeline
2. Identify Key Scenes
3. Decide How Much Detail to Add to Each Scene
4. Write Your Script
5. Choose Your Storyboarding Tool
6. Sketch Out Your Thumbnails
7. Annotate Each Scene with Details
8. Add Cuts
How to document an event using storyboarding?

A storyboard communicates a particular message or story through a series of images chronologically placed to convey the story or issue.

Components of a Storyboard

1. Ideation
   You can sketch out an idea of how a user may use a feature if it helps to visualize a potential experience or you want to have a better understanding of the user’s environment before starting development. Ideation storyboards should be used as a means of conversation rather than a lasting artefact or prioritization tool, as your scenario will most likely change once you are using real data.

2. Scenario
   Storyboards are based on a scenario or a user story. The description of the scenario or story is clear enough that a team member or stakeholder could understand what is depicted before looking at the visuals.

3. Visuals
   Each step in the scenario is represented visually in a sequence. The steps can be sketches, illustrations, or photos. Depending on the purpose of the storyboard and on its audience, these images can be quick, low-fidelity drawings or elaborate, high-fidelity artefacts. Images include details relevant to the story, such as what the user’s environment looks like, speech bubbles with quotes from the user, or a sketch of the screen that the user is interacting with.

4. Captions
   Each visual has a corresponding caption. The caption describes the user’s actions, environment, emotional state, device, and so on. Because the image is the primary content in a storyboard, captions are concise and don’t typically exceed two bullet points.

How to conduct a press conference?

- **Make sure it is merited**
  Must reveal information that is new, current, and of interest to the viewers and readers
  A key speaker or visiting celebrity associated with your project could greatly benefit the conference

- **How to plan a press conference?**
  **TIMING** – Make sure the date doesn’t clash with any other major event in the city
**VENUE** – in a convenient location, pre-book the venue, think of a visually interesting and appropriate location relevant to the project to host such an event.

**SPEAKERS** – confident speaker should ideally be speaking with passion and conviction, speaker should be briefed in prior and help them rehearse and prepare for the questions that might come up. Having multiple speakers for an event is always advantageous.

**AGENDA**
- Welcome and introductions
- Presentations
- Questions from press
- Closing remarks and thanks
- Speakers available for interview

Have the agenda planned in prior for better execution. Each speaker should ideally not take more than 10 minutes. Always put a time limit on question session. Always follow up on any questions that was not answered properly during the interview to manage for any crisis if required.

**PROVIDE A PRESS PACK**
Provide fact sheets about your project. Provide a brief biography of the speakers who are addressing the conference and a brochure about the event well in advance.

**EVALUATE AND REVIEW**
Evaluate the response from the event and note down the key learnings. Note down any useful contact made during the event for future reference.

**How to write a news release?**
- Use letter paper headed with all the relevant logos
- Have a clear heading / subject
- Dateline mentions the city you are sending release from and date you sent it
- Opening paragraph must grab the new editor’s attention so make sure its effective (key: use elements like who, what, when, why, where)
- Remainder of release – includes relevant information to your story/issue. Avoid excessive detail and confusing facts. Make sure it sounds interesting, unique and new. Includes quotes for making the content interesting. Explain who will be affected by the event. An image / graphic will help make your case stronger
- In case it exceeds a page, mention - more - at the end of the page
- At the end of text write a note to editors stating brief details about your organisation and contact information including Name, title, organisation, phone number, email address and website.
How to prepare for an interview?

**Things to keep in mind while preparing for an interview**

- Get your facts right. Be clear about every aspect of the project.
- Give yourself time to think about your answer and finish your answer even if the reporter interrupts you.
- Listen to the question carefully and move it conveniently towards your message.
- Keep the tone of the language conversational.
- Try to give current examples during the interview.
- Prepare yourself to be interrupted by the journalist several times during the interview. Just keep answering.
- Keep it concise and simple.
- Be prepared to be able to cite genuine reports, dates and people to back up your answers.
- Don’t answer from notes or scripts.

How to create a fact sheet?

- Reasons for making a fact sheet must be clear.
- Target audience must be clear.
- Message to convey should be short and clear.
- Some important facts / information must be highlighted in the fact sheet.
- Facts must come from reputable sources and should be up-to-date.
- Impressive presentation of the information supported with graphics is essential.
- Avoid overdoing percentages, using unscientific surveys or polls, and repetition of content.
- Remember that it is a single sheet of paper listing important facts about the project.

How to create a briefing memorandum/ comment card?

- Make it as short as possible- the memo should not be lengthy because it will be tiresome to read.
- Use simple language because the readers may end up missing up important points and the purpose will not be served.
- Use a captivating heading.
- Use bolding to emphasize.
- Use a different colour for the heading; you can decide to use a different color for your heading so that it can attract readers from a distance.
- Avoid making grammar and spelling errors.
Elements of a fact sheet

- **Project Title**
- **Project Branding** (Eg: logo in prominent location)
- **Message to be delivered**
- Supported with graphical data/survey outcomes etc. Following a common colour palette
- Facts confirmed from reliable sources

Elements of a comment card

- **Project Branding**
- **Survey questions**
- **Key objectives**
- **Stakeholder Information**
Memo Headings

Subject Detail

Summary of the project

Background

Project Details

This request for $10,000 is for a picture digitizing system and plug-in board for a PC clone, and for an Ethernet board and software. The system directly serves two NH grants and indirectly serve other users in the XYZ community through the ability to transfer these images over the campus network. Granting this request will enable these projects to achieve a solid technological base for image analysis.

Problem
Our research has become increasingly dependent upon image analysis to extract quantitative data from images taken through microscopes. This requirement has been the focus of a substantial effort over the past six years to develop algorithms for analyzing images.

MEMORANDUM
To: J.C. Crew, NIH Small Instrumentation Program
From: D. Men
Department of Mechanical Engineering
Room 5-220, MIT
Ext. 617-996-628

Subject: Request for an Image Digitizing System to Support Ongoing Research ($10,000)
Date:

This request will be a computer. Unfortunately, the software has surpassed the picture digitizing system that we are able to use. We are in dire need of reliable commercial systems that will digitize pictures in color at better than 1000 x 1000 pixels per picture.

The Participating Grantees
The two active NH grants that will immediately benefit from the requested imaging system include:

- HL-SCOR: Mars
  This grant investigates the influence of fluid shear stress on the structure and function of vascular endothelium. Imaging

Identify the audience/stakeholder group clearly

Clear subject of discussion to be mentioned
Elements of a webinar invite

- **Title**: The title of the webinar, which should be clear and descriptive.
- **Date of Event**: The date the webinar is scheduled.
- **Logos**: Logos of organizations involved or sponsors.
- **Key Features about the event**: Key aspects or benefits of the webinar.
- **Elements of a webinar invite**:
  - **Expert feature sessions**
  - **Live interaction with experts and online discussion groups**
  - **Peer dimensions**
  - **Built to deliver sessions on online communication and collaboration**

**INVITE FOR A WEBINAR**

Indo-Swiss BEEP Camp 2020: Student training on building energy efficiency

**Contact**

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Tel: +91 9898925816

**Register online by**

October 31, 2022

**BEEP** promotes green building energy efficiency and performance through education, research, technical assistance, and demonstration of new technologies.
Documentation
5 Documentation

1. Documentation Guidelines

i. Branding

Branding guidelines are very important for creating awareness and a knowledge of the work being done. When followed, these guidelines enable a wider reach and recall for the projects and the CITIIS program. The SPVs must comply with the branding and communication guidelines by the AFD and EU, and ensure visibility by incorporating logos across all communication products.

In addition, it is advisable to decide on a colour palette and typefaces that will be consistent across all content pertaining to the project.

The SPV teams and all program stakeholders may access the AFD and EU Communication and Branding Guidelines through the CITIIS Management Platform. For users not registered on the CMP, they may write to citiis@niua.org.
ii. Visual content: Photography

Capturing process/activities

- Photograph artifacts depicting an event or activity to include with notes about the project.
- Take photographs of the stakeholders involved to provoke questions or insights that you want to highlight.
- Take photographs of small groups or the whole group to display the scale of the event.
- Take photographs of individual/ groups when they have done something successful.
- Capture the start and end of key milestones in the maturation as well as implementation phase of the project.

On photo content

- Take before and after photos of the site from the same location, angle, and vantage point. If this is a long term effort, you may consider setting up locations and shots to repeat at subsequent events. Record photo point locations using notes, GPS, field markings, or associations with permanent markers such as fence posts, or other easily located spots.
- Consider angle, perspective, sun exposure, background, and other factors when framing your shot.

Maintain Gender Balance

Show action

Images should be natural, spontaneous, candid shots

Capture appropriate activities, sense of place and group efforts
iii. Permissions / image credits/ consent of stakeholders

How to give copyright credit to images?

With Copyright Owner Permission

- Include a © symbol next to the photograph, along with the name of the source or “Photo by (Name of Photographer);
- Position the photo credit directly with the image when possible, or include it as part of a single “Photo Credit” page.

Requesting Permission for Use

- Draft a letter of request and include the title of the publication where you plan to use the photograph, name of the publisher, type of publication, estimated number of copies to be printed, date of distribution, languages of distribution, territories of intended publication and what date the photo is needed;
- Indicate which type(s) of use of the photograph you need, such as reproduction, display or modification;
- Request which formats you need the photo copy provided in: Digital, print, scan or transparency. If you request a digital copy, include your preferred file format and resolution;
- Include the cost of publication or admission if copies will be sold or published in a free handout for attendees of an event, if applicable;
- Note admission cost, quantity of attendees and the event’s sponsor when using the photograph as part of a presentation; and
- Supply a plot synopsis and use context if you intend to show the photo in a movie or television broadcast.

iv. Photo filing and organizing

- Record names of people in each photo.
- Record other photo attributes: location, date, photographer, subject(s). It may help to record this information as you are taking photos and associated with the photo numbers.
- File and organize photos from the event as soon as you can, as it’s easy to forget details.
- Back up photos on a flash drive, portable hard drive, or in the cloud.
Evaluation
Communication evaluation requires careful planning to go ahead and “on time” measurement. Once your communication activities are closed it is usually too late to measure.

Besides being the only way you can tell if your communication has truly succeeded, evaluation:
- Improves the effectiveness of your communication;
- Helps engage your audience;
- Helps your team deal with situational change in the project; and
- Helps your organization allocate resources more effectively.

1. Steps in Evaluating Communication

   - Review your Goals and Objectives:

     The evaluation of a communications strategy should give you the information to show progress on meeting the set objectives, and whether or not you are closer to achieving your goal. The result of the evaluation should provide you with an evaluation report, that can form the basis of forming an action plan to revisit and revise the COP as and when needed.

   - What do you need to measure?

   - Pose your Evaluation Questions

   - Select your Evaluation Techniques

   - Estimate your budget

   - Plan an Evaluation Timeline

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   - What do you need to measure?

   - Pose your Evaluation Questions

   - Select your Evaluation Techniques

   - Estimate your budget

   - Plan an Evaluation Timeline

**Things to keep in mind**

- Setting out benchmarks for the desirable outcomes
- Each communication objective should have indicators for following up the success
- Organise and hold regular meetings with team
- Ensure timely access to available data collected from different sources
- Review and comment on compiled data regularly and disseminate the information
- Undertake an assessment of the quality of the report(s) and comment on the documents
- Conclusions and recommendations arising from the evaluation – based on a clear chain of logic should be circulated to all important stakeholders involved
- Keep a transparent record of the actions which have followed on from the recommendations
- Do focus on consistent evaluation and rectification in line with the set goals and objectives
- In case of any crisis, necessary steps should be taken for crisis management
- Follow up action of the information compiled post evaluation is crucial
identify the benchmarks or indicators that will showcase success or needed change.

As an example, to measure the effect of a communication activity per target audience, would involve determining if a key audience group actually received the messages directed to them, is paying attention to them, understanding and/or comprehending the messages, and whether they retaining the messages and can read them. In an urban project, this could be comprehended by evaluating effectiveness of the communication activity through the following type of indicators.

- By measuring the outputs (i.e. participation levels);
- By measuring the outtakes (i.e. levels of favourability, understanding, recall and retention); and
- By measuring outcomes (i.e. changes in opinion).

iii. **Pose your evaluation questions**

An evaluation question identifies what you need to find out. It will serve as a guide for what you need to ask, who you need to ask, and if you have baselines in place. Some evaluation questions include:

- Where have my messages first appeared? Local press? Web sites? Word of mouth?
- What evidence do I have that my messages are being absorbed by my audience?
- Is my audience engaged with the issue?
- Based on participation, do I change my message?

iv. **Select your evaluation techniques**

There is a wide variety of techniques you could deploy for the purposes of evaluation. Some are listed as under.

- **Surveys:** Surveys can be done in person, over the phone, or online. Surveys work best when respondents can “checkbox” answers that garner quantitative data. Surveys can collect qualitative data through open-ended questions; however, these introduce different types of interpretation bias into the overall results.

  **When to use:** Surveys are useful for collecting and categorizing data at any given time; and usually, work best for gathering close-ended responses.

- **Interviews:** Interviews consist of selecting a handful of individuals who represent your target group and ask them a series of open-ended questions. Interviewers usually take notes or ask their informants/respondents if they may use a tape recorder. Some use group interviews.
When to use: When you have identified a group of knowledgeable informants – participants, staff members, community members, media – an interview is a helpful tool in providing you with in-depth and detailed information about your program, the experience and/or changes needed.

- **Focus Groups**: Focus groups involve bringing together a group of people from your target group (usually 10-20 people) who can have a discussion about your communication activities. The discussion is usually moderated by an impartial facilitator.

  **When to use**: Focus groups are especially useful in testing of programs, services and even surveys. You are able to test specific messages, tactics or approaches and evaluate the results of the group.

- **Content Analysis**: Content analysis is usually done to assess the quality and tone of your media coverage.

  **When to use**: Use when you are trying to identify a positive or negative flow to media coverage on a particular issue.

- **Usage Tracking**: Simply tracking usage, such as web site hits, length of visits, online newsletter opens, Facebook likes, gives you some simple measurements to help evaluate.

  **When to use**: Useful for setting a baseline for communication activities, plans and strategies, that you can compare on an annual basis.

v. **Estimate a budget**

After you have selected your evaluation techniques, you will be in a better position to estimate your budget. Budget areas include cost of selected evaluation techniques, travel and incidentals; and publishing, event hosting costs etc. The CITIIS projects may use the budget allocated for Communication as a part of their grant for this purpose.

vi. **Set an Evaluation Time line**

Account for all activities to be undertaken as a part of the evaluation and update the monthly calendar of events as well as the overall time line under the COP. After completion of the periodic evaluation of the COP, the next step is to address the results of the evaluation, by either accepting or rejecting a recommendation. If accepted, an action plan must be prepared, and integrated into the COP document. In case rejected, a clear rationale for the same must be provided.
### Annexure 1: Content of COP document

<table>
<thead>
<tr>
<th>Section</th>
<th>Content</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INTRODUCTION</strong></td>
<td>1. Context and Background of the project</td>
<td>Give a brief background of the project objectives, components, and envisaged outcomes.</td>
</tr>
<tr>
<td></td>
<td>2. Purpose of the COP in the project</td>
<td>This section should establish the rationale for developing a communications and outreach plan. Highlight the multi-stakeholder nature of the project and how the strategy shall play a crucial role in strategizing all stakeholder engagement in the project.</td>
</tr>
<tr>
<td></td>
<td>3. Overarching project goals and COP Objectives</td>
<td>Clearly defined objectives under classified as 'Strategic' and 'Operational' objectives.</td>
</tr>
<tr>
<td></td>
<td>3.1. Strategic Objectives</td>
<td>Strategic objectives are the long-term goals that help to convert the project's vision into more specific plans. In case of CITIIS projects, these would be objectives spanning for the entire project duration.</td>
</tr>
<tr>
<td></td>
<td>3.2. Operational Objectives</td>
<td>Operational objectives are daily, weekly or monthly project benchmarks that implement larger strategic objectives.</td>
</tr>
<tr>
<td></td>
<td>4. Project Outcomes and Key Messages</td>
<td>As an example: Ensuring adequate program and project branding is a strategic objective, while preparation of communication materials as needed is an operational objective.</td>
</tr>
<tr>
<td><strong>COMMUNICATION AND OUTREACH STRATEGY</strong></td>
<td>1. Introduction and Background to the Project’s Communication Strategy</td>
<td>The communication strategy lists communication activities planned across project phases for meeting operational and strategic objectives, mapping communication activities to the target audience, laying the groundwork, preparing a timeline and budget, and the plan for implementation.</td>
</tr>
<tr>
<td></td>
<td>2. Target Audience</td>
<td>This section shall draw from Stakeholder Mapping and Stakeholder Engagement Plan documents prepared by all CITIIS project teams as a part of the maturation phase.</td>
</tr>
<tr>
<td></td>
<td>3. Defining the Action/Implementation Plan</td>
<td>This section shall list down activities planned across different project phases in each of the project component, and the required communication and outreach activity under each.</td>
</tr>
<tr>
<td></td>
<td>3.a. Communication and Public Engagement Tools</td>
<td>List down the tools and methods that shall be deployed in carrying out the targeted communication activity.</td>
</tr>
<tr>
<td></td>
<td>3.b. Time line / Schedule of activities</td>
<td>The timeline and schedule of activities would be a broad estimation of when each planned activity would be undertaken. Towards operationalisation of the broad timeline, each SPV shall prepare a monthly calendar of activities and share with the CITIIS PMU.</td>
</tr>
<tr>
<td></td>
<td>3.c. Budget</td>
<td>Under the CITIIS program, all SPVs may utilise a minimum of 2 per cent of the total project costs for communication programs in order to enhance the participatory, outreach and visibility aspects of the project.</td>
</tr>
<tr>
<td></td>
<td>3.d. Plan for Marketing and Promotion</td>
<td>The marketing strategy would help you promote the benefits of your project to the end users. You could use a combination of methods to achieve this. Your marketing mix could include online and offline notices/information; Billboards in the city, announcements on radio and television and by hosting public events.</td>
</tr>
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<td>3.e. Plan for Project Branding</td>
<td>Branding for CITIIS projects shall include following the Branding and Communication Guidelines by the AFD and the EU.</td>
</tr>
<tr>
<td><strong>EXECUTION</strong></td>
<td>1. Plan for operationalising the methods identified in the Communications Strategy</td>
<td>This shall include the following:</td>
</tr>
<tr>
<td></td>
<td>1. The SPV will identify a plan for execution against each activity and incorporate the information in the COP.</td>
<td></td>
</tr>
<tr>
<td><strong>DOCUMENTATION</strong></td>
<td>1. List the type of documentation that shall be prepared for/as a result of any communication activity.</td>
<td>Creating documentation as needed to successfully carry out a communication activity. E.g.: creating a factsheet, storyboard, or hosting an event, issuing a press release etc. The SPV must keep an organised documentation of work, maps, and all communication material generated in the project.</td>
</tr>
<tr>
<td><strong>EVALUATION</strong></td>
<td>1. Evaluation timeline</td>
<td>Evaluation is an ongoing, systematic process. It should be included in all communication planning to evaluate activities, plans and strategies. Refer to Section 4 for a sample worksheet on preparing an evaluation timeline.</td>
</tr>
<tr>
<td></td>
<td>2. Evaluation techniques</td>
<td>Evaluation techniques that are deployed depend on the kind of data you have collected in the project.</td>
</tr>
<tr>
<td></td>
<td>3. Set Indicators</td>
<td>Identify relevant indicators to monitor and evaluate your communication and outreach strategy.</td>
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<td></td>
<td>4. Evaluation response</td>
<td>Results of the evaluation will include interventions that worked and did not work. Subsequently prepare a plan of action for any revisions needed in the strategy.</td>
</tr>
<tr>
<td></td>
<td>5. Evaluation report</td>
<td></td>
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</tbody>
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Toolkit for Developing an Effective Communications and Outreach Plan

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### Annexure 2: Sample Work Plan for a COP

**List Objectives of the COP**

I. .....  
II. .......

III. .......
IV. ..........  

<table>
<thead>
<tr>
<th>Stakeholder Category 1</th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
<th>4.</th>
<th>Expected Output</th>
<th>Person In charge</th>
<th>Budget</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Stakeholder Category 2</th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
<th>4.</th>
<th>Expected Outcome</th>
<th>Person In charge</th>
<th>Budget</th>
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</table>

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<thead>
<tr>
<th>Stakeholder Category 3</th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
<th>4.</th>
<th>Expected Outcome</th>
<th>Person In charge</th>
<th>Budget</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Stakeholder Category 4</th>
<th>1.</th>
<th>2.</th>
<th>3.</th>
<th>4.</th>
<th>Expected Outcome</th>
<th>Person In charge</th>
<th>Budget</th>
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</table>

**Timeline of Implementation**  
(Write estimated date of completion in this column, whereas mark out the estimated timelines in the columns on the right)

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<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
<th>J</th>
<th>A</th>
<th>S</th>
<th>O</th>
<th>N</th>
<th>D</th>
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</table>

**Inputs/Communication Channel**

**Target Groups**

- Stakeholder Category 1
- Stakeholder Category 2
- Stakeholder Category 3
- Stakeholder Category 4

**Key Message**

**Proposed Activity**

**Expected Outcome**

**Person In charge**

**Budget**

**Timeline of Implementation**

(Write estimated date of completion in this column, whereas mark out the estimated timelines in the columns on the right)
### Annexure 3: Framework for Monitoring and Evaluation of a Communications Strategy

<table>
<thead>
<tr>
<th>Activities planned</th>
<th>Tools and methods (physical engagements/digital/print, etc.)</th>
<th>Target group</th>
<th>Number of participants (gender disaggregated data)</th>
<th>Expected Date of Completion</th>
<th>Status (Complete/in-progress/pending)</th>
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</table>

Disclaimer: SPVs are expected to propose a list of indicators and associated calculation methodology in their respective Communication and Outreach Plan. The same, upon validation by Communications Specialist at the PMU, will be reported and monitored as part of ‘Monitoring and Evaluation’ module on CITIIS Management Platform.

### Annexure 4: Sample monthly event calendar showing the distribution of activities that make up a communications and outreach plan

The SPV may prepare and upload this calendar/ update the calendar on their website. The same shall be updated on the program calendar on the CITIIS Program Website.

It is suggested to maintain a time ratio of 25% for strategy, 50% for execution and 25% for documentation and evaluation for every month.
Monthly Event Calendar

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Input meetings, Team discussions</td>
<td>Social media post, Input meeting, team discussion</td>
<td>Major Events - Conferences, Public gatherings, Workshops etc.</td>
<td>**</td>
<td>Stakeholder Meetings</td>
<td>Social media post, Project banners/ brochures</td>
<td>Art Installations in neighbourhoods, Online polls</td>
</tr>
<tr>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>21</td>
</tr>
<tr>
<td>Input meetings, Team discussions</td>
<td>Webinar invite, Event Preparation</td>
<td>Mail invites event ads, e-newsletter, text alerts</td>
<td>Press release, Media interview</td>
<td>Social media post, Project banners/ brochures</td>
<td>Stakeholder Meetings</td>
<td>Public Engagement, Activity, Public hearing</td>
</tr>
<tr>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>Input meetings, Team discussions</td>
<td>Webinar, Online Presentations</td>
<td>Letter to Editor, Presentation to Civic authorities</td>
<td>Social media post, Media article</td>
<td>Team discussions, evaluation</td>
<td>Stakeholder Meetings</td>
<td>Art Installations in neighbourhoods, Online polls</td>
</tr>
<tr>
<td>29</td>
<td>30</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team discussions, Meetings and reviews and evaluations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>** Evaluation of outcomes and team discussions at the end of each day will enhance the result the next day</td>
</tr>
</tbody>
</table>