



DOCUMENTING
AND COMMUNICATING
HIV/AIDS WORK

A TOOLKIT TO SUPPORT
NGOS/CBOS

Contents of the toolkit

Contents

<i>Introduction to the toolkit</i>	3
1 What is this toolkit?	4
2 Why and how was this toolkit developed?	5
3 Who is this toolkit for?	5
4 How can this toolkit be used?	5
5 What is in the sections of this toolkit?	6
6 What is in the Handouts of this toolkit?	7
7 What is in the Information Cards of this toolkit?	7
8 How long does this toolkit take to use?	8
9 What materials are needed to use this toolkit?	8
Workshop schedule: Example 1	9
Workshop schedule: Example 2	10
<i>Section 1: Introducing documentation and communication</i>	11
1.1 What is documentation and communication?	12
1.2 Why do we document and communicate?	14
1.3 Who do we document and communicate for?	16
1.4 What makes good documentation and communication?	18
1.5 What can we learn from our past documentation and communication?	20
1.6 What skills do we need for documentation and communication?	22
1.7 What difficulties and sensitivities are there in documenting and communicating HIV/AIDS work?	24
<i>Section 2: Making a plan for a documentation and communication product</i>	27
Making a planning framework and grid	28
2.1 Planning Step 1: Deciding an aim and objectives	30
2.2 Planning Step 2: Identifying priority audiences	32
2.3 Planning Step 3: Choosing key messages	34
2.4 Planning Step 4: Selecting a product	36
2.5 Planning Step 5: Developing the product	38
5A: What structure, content and style will the product have?	38
5B: How will the product be prepared and produced?	40
5C: Who will do the work?	42
5D: When will the work be done?	44
2.6 Planning Step 6: Disseminating the product	46
2.7 Planning Step 7: Monitoring and evaluating the product	48
2.8 Finalising the plan	50
Handouts	52 – 54

Contents of the toolkit

Contents

Section 3: Making an overall documentation and communication plan **55**

- | | | |
|------------|---|----|
| 3.1 | Making an overall documentation and communication plan | 56 |
| 3.2 | Integrating documentation and communication into an organisational plan | 62 |
| | Handout | 64 |

Section 4: Building documentation and communication skills **65**

- | | | |
|-------------|---|----------|
| 4.1 | A: Identifying strengths, weaknesses and gaps | 66 |
| | B: Identifying lessons learned | 68 |
| 4.2 | Preparing an effective interview | 70 |
| 4.3 | Taking good notes | 72 |
| 4.4 | Choosing how to present information | 74 |
| 4.5 | Linking text and visuals | 76 |
| 4.6 | Keeping information short | 78 |
| 4.7 | Using simple language | 80 |
| 4.8 | Using appropriate and accurate language | 82 |
| 4.9 | Taking good photographs | 84 |
| 4.10 | Using photographs well | 86 |
| 4.11 | Making good visual aids | 88 |
| 4.12 | Delivering effective presentations | 90 |
| | Handouts | 92 – 116 |

Section 5: Information cards – for developing documentation and communication products **117**

- | | |
|-----------------------------|------------------|
| Information card 1: | Case study |
| Information card 2: | Newsletter |
| Information card 3: | Leaflet |
| Information card 4: | Workshop report |
| Information card 5: | Abstract |
| Information card 6: | Annual report |
| Information card 7: | Presentation |
| Information card 8: | Policy report |
| Information card 9: | Photo-story book |
| Information card 10: | Video |
| Information card 11: | Website |
| Information card 12: | Radio programme |

Introduction to the toolkit



Contents

1	What is this toolkit?	4
2	Why and how was this toolkit developed?	5
3	Who is this toolkit for?	5
4	How can this toolkit be used?	5
5	What is in the sections of this toolkit?	6
6	What is in the Handouts of this toolkit?	7
7	What is in the Information cards of this toolkit?	7
8	How long does this toolkit take to use?	8
9	What materials are needed to use this toolkit?	8
	Workshop schedule: Example 1	9
	Workshop schedule: Example 2	10

Summary of Introduction to the toolkit

“Documenting and Communicating HIV/AIDS Work” is a toolkit of participatory activities that aims to build practical skills among NGOs/CBOs responding to HIV/AIDS in developing countries. It is a resource to help such groups improve the quality of their programme work and external relations – by recording, learning from and sharing their lessons and results.

“Documenting and Communicating HIV/AIDS Work” is based on the practical experiences and participatory approaches of the International HIV/AIDS Alliance.

The toolkit is designed to be used by organisations and trainers who support NGOs/CBOs. It can be used flexibly, with one or a group of NGOs/CBOs, and during training workshops or technical support visits.

The toolkit has five sections that cover the concepts, planning steps and skills involved in carrying out effective documentation and communication work, as well as Information cards about developing specific products.

This toolkit can also be downloaded from the Alliance’s website www.aidsalliance.org or supplied as a CD-ROM from the Alliance (see back cover for contact details).

Introduction to the toolkit

1. What is this toolkit?

This toolkit supports NGOs/CBOs in developing countries to effectively document and communicate their work on HIV/AIDS.

What is this toolkit about?

This toolkit is about documentation and communication work. For NGOs/CBOs involved in HIV/AIDS, this means practical ways to record, learn from and share their experiences, results and lessons learned – for the benefit of their own organisation and others. The types of products involved include case studies, reports, photo-story books and newsletters.

This toolkit is *not* about Information, Education and Communication (IEC) work – which is a programme strategy used by NGOs/CBOs to raise awareness about HIV/AIDS among communities. The type of products used for IEC include information leaflets about HIV/AIDS and flipcharts for training sessions.

“**Documenting and Communicating HIV/AIDS Work**” is one in a series of toolkits that are based on the practical experiences of the International HIV/AIDS Alliance. The International HIV/AIDS Alliance is an international non-governmental organisation that supports communities in developing countries to prevent the spread of HIV, support and care for those infected and ease the impact of HIV on families and communities. Since its establishment in 1993, the Alliance has provided both financial and technical support to more than 1,500 HIV/AIDS projects and has worked with NGOs and CBOs from over 40 countries.

By distributing this toolkit widely, the Alliance aims to:

- **Build practical skills** among NGOs/CBOs by using participatory activities and sharing experiences.
- **Provide a training resource** for NGO support programmes, training organisations and individual trainers.
- **Continue learning** about how NGOs/CBOs can successfully document and communicate their work.

2. Why and how was this toolkit developed?

The Alliance and its partners in developing countries have come to realise that, although NGOs/CBOs are carrying out creative and effective action on HIV/AIDS, they often do not document their work. This has prevented them from making full use of their lessons and results – in terms of both promoting their organisations and improving the quality of their own work and that of others. In response, the Alliance developed a training programme in this area – the lessons and activities from which form the basis of this toolkit.

The development of this toolkit has been inspired by the **experiences and ideas of many organisations in many countries**. In particular, this includes the groups that collaborated with the Alliance during three comprehensive field tests of the draft text. These were carried out in Zambia with the Central Board of Health (CBoH) and the Zambia Integrated Health Programme (ZIHP); the Philippines with Philippines HIV/AIDS NGO Support Program (PHANSuP); and Uganda with Uganda Network of AIDS Service Organisations (UNASO). Special thanks are given to Sarah Lee, as the lead author, and also to Supanya Lamsam.

During the development of the training programme and toolkit, the Alliance's work in documentation and communication has been supported by a range of **international donors**. These include the UK Government's Department for International Development (DFID), Merck & Co. Inc. and the United States Agency for International Development (USAID).

3. Who is this toolkit for?

“Documenting and Communicating HIV/AIDS Work” is for **people and organisations that support NGOs/CBOs responding to HIV/AIDS in developing countries**. These include NGO support programmes, training institutions and individual trainers.

It is important that people using this toolkit already have some basic facilitation skills, for example in guiding large group discussions and small group activities. It is also helpful if they have some previous experience in documentation and communication work, although this is not essential.

The booklet enclosed with this toolkit – **“A Facilitators' Guide to Participatory Workshops”** – provides some ideas that will be useful for facilitating this type of workshop. These ideas include how to prepare for a participatory workshop and how to prepare and facilitate participatory activities.

4. How can this toolkit be used?

This toolkit is designed to be **flexible so that facilitators** can tailor the work schedule to meet the needs of different NGOs/CBOs. For example, some groups may want to have a training workshop in which they do most of the activities in one go, while others may want to use a selection of activities over a period of time, or to focus on one or two activities to meet a specific, urgent need. To provide this choice, Sections 1, 4 and 5 of the kit are designed for “pick and mix” – meaning that the activities can be used in any order or combination. However, it should be noted that Sections 2 and 3 – which take participants through the planning of documentation and communication work – are a series of linked activities that need to be followed in order and as a whole.

For most of the toolkit, facilitators can use the activities with **either an individual NGO/CBO or a group of NGOs/CBOs**. However, for Sections 2 and 3, participants need to work with colleagues from their own organisation. This is because planning documentation and communication work needs to be specific to each individual NGO/CBO.

This toolkit can be used with **NGOs/CBOs of different levels of experience** in documentation and communication. However, it is particularly suitable for those that are new to this area of work.

5. What is in the sections of this toolkit?

Following this Introduction, the toolkit is divided into five sections:

Section 1: Introducing documentation and communication

Section 2: Making a plan for a documentation and communication product

Section 3: Making an overall documentation and communication plan

Section 4: Building documentation and communication skills

Section 5: Information cards

Section 1 provides an introduction to documentation and communication. It covers the key concepts – such as what documentation and communication is, why it is done, and whom it is for. It also helps NGOs/CBOs to think about what makes good documentation and communication, to learn from their past experiences in this area, and to think about what skills they will need. Finally, it helps NGOs/CBOs to think about issues that are specific to documenting and communicating HIV/AIDS work.

This section helps NGOs/CBOs to “lay the foundations” for their documentation and communication work by developing a strong understanding of what this area is and is not about, and what it can and cannot achieve.

Section 2 outlines the step-by-step process of making a detailed plan for a documentation and communication product. It starts by supporting NGOs/CBOs to develop a planning framework and then guiding them through each step, including selecting an aim and objectives, audiences, key messages and product. It then provides in-depth support in developing a specific product, including deciding its structure, content and style, and how it will be prepared and produced – including who will do the work and when it will be done. It then covers dissemination and monitoring, before ending with support in how to review and finalise a plan.

This section helps NGOs/CBOs to think through all of the steps involved in developing a documentation and communication product. It encourages groups to be creative, as well as strategic and realistic. This helps to ensure that their efforts will bring concrete benefits to their organisation and its HIV/AIDS work.


Section 3 complements Section 2 by focusing on how to make an overall documentation and communication plan and how to integrate documentation and communication work into an organisational plan.

This section helps NGOs/CBOs to see the “bigger picture” of their documentation and communication work. It includes looking at their long-term “vision” for this area and how it fits with their group’s overall work. This helps to make sure that their efforts are not carried out in isolation.

Section 4 focuses on building practical skills for carrying out and improving documentation and communication work. It includes activities to help NGOs/CBOs to improve the quality of the information that they gather, such as identifying the strengths, weaknesses, gaps and lessons learned of their chosen subject, carrying out effective interviews and taking good notes. The section pays particular attention to improving the quality of text and visual materials, and the links between the two. For example, how to present information, keep text short, use language that is simple, appropriate and accurate, and take and use good photographs. It also includes activities to help with developing effective visual aids and delivering presentations.

This section helps NGOs/CBOs to ensure that their documentation and communication work is as creative and effective as possible. The activities can be used to support participants who are planning a specific product or those who want to improve specific aspects of their work.

The contents of each part of Sections 1 – 4 follow the format below:



Aim	– stating what the activity is designed to achieve.
Introduction	– explaining the subject area and the key issues involved.
Instructions	– outlining the steps to take to complete the activity, and the key questions to consider.
Facilitators' notes	– sharing “useful ideas” about how to successfully guide participants through the activity.
Example	– showing how an NGO/CBO has put the activity into practice.
Activity shortcut <i>(in Sections 1 and 2 only)</i>	– providing a quick way to address the subject if participants lack time or are very experienced.

Facilitators can read through the Aim and Introduction for each point and use them as the basis for an initial group discussion. They can then work through the Instructions for the activity, using the Facilitators' Notes to avoid possible pitfalls. Finally, they can use the Example to clarify any points that are unclear. It is important to note that, although the ideas and activities in this toolkit have been tried and tested by the International HIV/AIDS Alliance and its partners, they do not try to provide “perfect” examples of how things should be done. Therefore, the Instructions should not be followed “word for word” and should, instead, be adapted to participants' specific needs, skills and interests. Also, the Examples should be seen as just one way that the Activity can be put into action – as opposed to the “perfect way”.

6. What is in the Handouts of this toolkit?

Handout sheets can be found at the back of Sections 2, 3 and 4. These aim to provide additional technical information and handy hints for some of the activities. Facilitators can use them in a number of different ways. For example, they can read them beforehand to prepare for the activities or use them during group feedback sessions. They can also share them with participants, for example by copying them on to overhead transparencies or by making photocopies for people to take away with them.

7. What is in the Information cards in this toolkit?

Section 5 provides Information cards to help participants to develop specific documentation and communication products. These are:

- Case studies
- Workshop reports
- Policy reports
- Videos
- Newsletters
- Abstracts
- Presentations
- Radio programmes
- Leaflets
- Annual reports
- Photo-story books
- Websites

Each Information card is four pages long:

- The front page introduces the product and three key questions to ask before starting to develop it.
- The two centre pages use an example outline of the structure and content of the product to highlight some practical “dos and don'ts”.
- The back page focuses on “useful ideas” about the style of the product.

This section helps participants to focus on the specific documentation and communication products that they want to produce. It helps them to think through the strengths and weaknesses of these products, and the specific technical issues involved. This helps them to plan and produce products that will be as useful and effective as possible.

The Information cards can be used by facilitators at different stages of training. This might include when participants are selecting their documentation and communication product, or when they are planning how to develop it. The Information cards are particularly useful if used alongside Section 2 – as they help to ensure that the products are thoroughly planned.

8. How long does this toolkit take to use?

Each activity in this toolkit includes an estimated time of how long it will take to complete. These are based on the Alliance's practical experiences of using the toolkit in workshops with 15 – 20 participants. However, in practice, facilitators can make the activities shorter or longer, depending on the time available and the level of skills and interest of the participants.

The activity shortcuts in Sections 1 and 2 take approximately 20 – 30 minutes.

Most of the main sections of this toolkit can be covered in a five-day workshop. This provides enough time to introduce documentation and communication work, develop a plan for a specific product, and strengthen some selected skills. Some examples of schedules for workshops are shared at the end of this Introduction.

9. What materials are needed to use this toolkit?

All of the activities in this toolkit can be used with a small number of simple resources. These are:

- Large sheets of blank paper
- Small pieces of blank paper
- Marker pens
- Sticky tape, Blu-Tack or Sticky Stuff.

Most of all, both facilitators and participants will need enthusiasm, energy and creativity!

Workshop schedule: Example 1

This schedule is based upon workshops carried out by the International HIV/AIDS Alliance. The first day introduces participants to documentation and communication. The second, third and fourth days include planning for a specific product during the mornings and building practical skills in the afternoons. The fifth day focuses on making an overall documentation and communication plan, and preparing and presenting participants' final plans for specific products. For all of the sessions, the relevant sections of the toolkit are written in brackets. The timings are approximately the same as those suggested in this toolkit, but some have been shortened to fit the available time.

	08.30 – 10.30	11.00 – 13.00	14.00 – 17.00
DAY 1 <i>Introduction</i>	<p>Introduction to workshop and participants</p> <p>Workshop expectations and ground rules</p> <p><i>What is documentation and communication? (Section 1.1)</i></p>	<p><i>Why do we document and communicate? (Section 1.2)</i></p> <p><i>Who do we document and communicate for? (Section 1.3)</i></p> <p><i>What makes good documentation and communication? (Section 1.4)</i></p>	<p><i>What can we learn from our past documentation and communication? (Section 1.5)</i></p> <p><i>What skills do we need for documentation and communication? (Section 1.6)</i></p> <p><i>What difficulties and sensitivities are there in documenting and communicating HIV/AIDS work? (Section 1.7)</i></p>
DAY 2 <i>Planning and skills building</i>	<p>Recap of previous day</p> <p><i>Making a planning framework (start of Section 2)</i></p> <p><i>Planning Step 1: Deciding an aim and objectives (Section 2.1)</i></p>	<p><i>Planning Step 2: Identifying priority audiences (Section 2.2)</i></p> <p><i>Planning Step 3: Choosing key messages (Section 2.3)</i></p>	<p><i>Skills building: Keeping information short (Section 4.6)</i></p> <p><i>Skills building: Using simple language (Section 4.7)</i></p> <p><i>Skills building: Using appropriate and accurate language (Section 4.8)</i></p>
DAY 3 <i>Planning and skills building</i>	<p>Recap of previous day</p> <p><i>Planning Step 2.4: Selecting a planning product (Section 2.4)</i></p> <p><i>Planning Step 5A: What structure, content and style will the product have? (Section 2.5)</i></p>	<p>BREAK 10.30 – 11.00</p> <p><i>Planning Step 5B: How will the product be prepared and produced? (Section 2.5)</i></p> <p><i>Planning Step 5C: Who will do the work? (Section 2.5)</i></p>	<p>LUNCH 13.00 – 14.00</p> <p><i>Skills building: Choosing how to present information (Section 4.4)</i></p> <p><i>Skills building: Making good visual aids (Section 4.11)</i></p> <p><i>Skills building: Taking good photographs (Section 4.9)</i></p>
DAY 4 <i>Planning and skills building</i>	<p>Recap of previous day</p> <p><i>Planning Step 5D: When will the work be done? (Section 2.5)</i></p> <p><i>Planning Step 6: Disseminating the product (Section 2.6)</i></p>	<p><i>Planning Step 7: Monitoring and evaluating the product (Section 2.7)</i></p> <p><i>Finalising the plan (Section 2.8)</i></p>	<p><i>Skills building: Identifying strengths, weaknesses and gaps (Section 4.1A)</i></p> <p><i>Skills building: Identifying lessons learned (Section 4.1B)</i></p> <p><i>Skills building: Preparing an effective interview (Section 4.2)</i></p>
DAY 5 <i>Planning and presentation</i>	<p>Recap of previous day</p> <p><i>Making an overall documentation and communication plan (Section 3.1)</i></p> <p><i>Integrating documentation and communication into an organisational plan (Section 3.2)</i></p>	<p>Preparation for presentation of final plans</p>	<p>Presentation of final plans</p> <p>Workshop evaluation</p> <p>Closing ceremony</p>

Workshop schedule: Example 2

This example schedule is based upon workshops carried out by the International HIV/AIDS Alliance. During the first day, it introduces documentation and communication to participants. During the second and third days, it takes them through the planning steps for a specific product and provides time to review the relevant Information cards. On the fourth and fifth days, it focuses on building selected practical skills. For all of the sessions, the relevant sections of the toolkit are written in brackets. The timings of the sessions are approximately the same as those suggested in this toolkit, but some have been shortened to fit the available time.

	08.30 – 10.30	11.00 – 13.00	14.00 – 17.00
DAY 1 <i>Introduction</i>	<p>Introduction to workshop and participants</p> <p>Workshop expectations and ground rules</p> <p>What is documentation and communication? (Section 1.1)</p>	<p>Why do we document and communicate? (Section 1.2)</p> <p>Who do we document and communicate for? (Section 1.3)</p> <p>What makes good documentation and communication? (Section 1.4)</p>	<p>What can we learn from our past documentation and communication? (Section 1.5)</p> <p>What skills do we need for documentation and communication? (Section 1.6)</p> <p>What difficulties and sensitivities are there in documenting and communicating HIV/AIDS work? (Section 1.7)</p>
DAY 2 <i>Planning</i>	<p>Recap of previous day</p> <p>Making a planning framework and grid (front of Section 2)</p> <p>Planning Step 1: Deciding an aim and objectives (Section 2.1)</p>	<p>Planning Step 2: Identifying priority audiences (Section 2.2)</p> <p>Planning Step 3: Choosing key messages (Section 2.3)</p>	<p>Planning Step 4: Selecting a product (Section 2.4)</p> <p>Planning Step 5A: What structure, content and style will the product have? (Section 2.5)</p>
DAY 3 <i>Planning</i>	<p>Recap of previous day</p> <p>Planning Step 5B: How will the product be prepared and produced? (Section 2.5)</p> <p>Planning Step 5C: Who will do the work? (Section 2.5)</p> <p>Planning Step 5D: When will the work be done? (Section 2.5)</p>	BREAK 10.30 – 11.00	LUNCH 13.00 – 14.00
DAY 4 <i>Skills building</i>	<p>Recap of previous day</p> <p>Skills building: Using simple language (Section 4.7)</p> <p>Skills building: Using appropriate and accurate language (Section 4.8)</p>	<p>Skills building: Preparing an effective interview (Section 4.2)</p> <p>Skills building: Taking good notes (Section 4.3)</p>	<p>Skills building: Identifying strengths, weaknesses and gaps (Section 4.1A)</p> <p>Skills building: Identifying lessons learned (Section 4.1B)</p> <p>Skills building: Keeping information short (Section 4.6)</p>
DAY 5 <i>Skills building and presentation</i>	<p>Recap of previous day</p> <p>Skills building: Taking good photographs (Section 4.9)</p> <p>Skills building: Using photographs well (Section 4.10)</p>	<p>Workshop evaluation</p> <p>Preparation for presentation of final plans</p>	<p>Presentation of final plans</p> <p>Closing ceremony</p>

Introducing documentation and communication

Section 1

Contents

1.1	What is documentation and communication?	12
1.2	Why do we document and communicate?	14
1.3	Who do we document and communicate for?	16
1.4	What makes good documentation and communication?	18
1.5	What can we learn from our past documentation and communication?	20
1.6	What skills do we need for documentation and communication?	22
1.7	What difficulties and sensitivities are there in documenting and communicating HIV/AIDS work?	24

Summary of Section 1

Section 1 of this toolkit helps NGOs/CBOs to “lay the foundations” for their documentation and communication work. This involves thinking through the basic issues involved – such as what documentation and communication is, why it is done, and who it is for.

This section also helps NGOs/CBOs to think about what makes good documentation and communication, to learn from their past experiences in this area, and to think about what relevant skills they will need in the future. Finally, it helps NGOs/CBOs to think about issues that are specific to documentation and communication of HIV/AIDS work.

This section is important because it helps NGOs/CBOs to “get off on the right track” in their documentation and communication. This is achieved by having a strong understanding of what this area of work is and is not about, and what it can and cannot achieve. This understanding will, in turn, help NGOs/CBOs to develop documentation and communication plans that are focused, realistic and effective.



1.1. Aim: To develop a common understanding of what documentation and communication is

Introduction

Before starting work on documentation and communication, an NGO/CBO needs to understand what the term means.

Many people have different ideas about what type of work documentation and communication involves. So, developing a common understanding is important – to help organisations to “lay the foundations” for plans that will be clear and focused.

For an NGO/CBO involved in HIV/AIDS, documentation and communication is about recording, learning from and sharing its experiences, results and lessons learned – for the benefit of its own organisation and others. This is different from Information, Education and Communication (IEC) – which an NGO/CBO might carry out as part of its programme work to raise awareness about HIV/AIDS among community members.

Instructions

Timing: 45 minutes

- 1** Explain the aim of the activity.
- 2** Divide participants into two groups.
- 3** Ask the first group to brainstorm what is meant by “documentation” and to list key words or phrases about the term. Ask the second group to do the same for “communication”. (See Example.)
- 4** Bring the two groups back together, and ask each to share their results.
- 5** Ask participants to identify any nouns and verbs that are common to the two definitions.
- 6** Ask the whole group to develop a combined definition of “documentation and communication”. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Does the group’s definition of “documentation and communication” reflect both “documentation” and “communication”?
 - ? Is the group’s definition of “documentation and communication” as practical as possible?
 - ? What is the difference between documentation and communication work and IEC work?

Facilitators' notes

- ! Stress that participants need only focus on “What?” in this activity – as the following activities will look at “Why do we document and communicate?” and “Who do we document and communicate for?”
- ! Ensure that, by the end of the activity, the participants are absolutely clear about:
 - What documentation and communication are.
 - What IEC is.
 - What the difference between the two is.
- ! Help participants to focus on developing a common understanding of documentation and communication – rather than an exact definition. If you are short of time, you might ask a group of volunteers to work on the definition alone, and to bring it back to the group for agreement later.
- ! Ensure that participants have a clear view of documentation and communication right from the start. To support this, it may help to facilitate a discussion about the difference between some words that are often confused. These include:
 - “Documentation” and “documents”.
 - “Reporting” and “report writing”.
 - “Data” and “information”.

Example: HIV/AIDS STD Alliance of Bangladesh (HASAB), Bangladesh

HASAB is an HIV/AIDS NGO/CBO support programme. During a training workshop for staff, they divided into two groups and held brainstorms. The first group listed key phrases to define “documentation,” while the second focused on “communication”.

Group 1: Key phrases about documentation

- Pulling together information, analysing it and recording it.
- Compiling data and writing it up.
- Carrying out a process that has objectives about learning.
- Preserving ideas and challenges for future use and reference.
- Using different media – such as writing, photographs and drawings.

Group 2: Key phrases about communication

- Communicating messages and promoting specific ideas.
- Doing something that involves different stages.
- Sharing our experiences and lessons among ourselves.
- Sharing our findings with others.
- Using different methods – such as reports, articles and presentations.

Then the groups shared their results and worked together to develop a combined definition of “documentation and communication”.

Combined definition of documentation and communication

“Documentation and communication work is about finding practical ways to record, learn from, share and promote our experiences, results and lessons learned.”

The facilitator then led a discussion about what had been learned from the activity, for example about how important it is to have a practical definition of documentation and communication that will be as useful as possible for NGOs/CBOs.

(Reference: Adapted from a workshop on “Documentation and Communication”, HIV/AIDS STD Alliance of Bangladesh and the International HIV/AIDS Alliance, Bangladesh, June 1999.)



Share the definition of “documentation and communication” in the above example. Ask participants if they agree with it or whether they would change it.



1.2. Aim: To develop a common understanding of why documentation and communication is important

Introduction

Having decided what documentation and communication is, an NGO/CBO needs to think about why they might do it.

Documentation and communication has many benefits. These include helping NGOs/CBOs to raise their profile and plan and monitor their work. However, it also takes time, energy and resources. So, deciding why an NGO/CBO should do it involves looking at what advantages the work can bring to an organisation and its HIV/AIDS work.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Divide participants into small groups, and remind them of the definition that they developed of documentation and communication (see Section 1.1).
- 3** Ask each group to brainstorm reasons for doing documentation and communication work, and to write each one on a separate piece of paper.
- 4** Ask each group to develop a “ranking line” on flipchart paper. Ask them to mark different levels of importance along the line – such as “not important”, “quite important” and “very important”. (See Example.)
- 5** Ask the participants to discuss how important each of their reasons is and to reach agreement as a group. Then ask them to place their pieces of paper at appropriate points along the ranking line.
- 6** Bring everyone back together, and ask the groups to present their ranking lines. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Are the most important reasons the same for all NGOs/CBOs? If not, why are they different?
 - ? What do the two to three priority reasons tell us about the type of documentation and communication work that NGOs/CBOs should focus on?
 - ? How many of the reasons relate to the expectations of others rather than the needs of the NGO/CBO? How can NGOs/CBOs balance these?



A group at a workshop in the Philippines discussing the benefits of documenting and communicating their HIV/AIDS work.

Facilitators' notes

- ! Ensure that participants develop reasons to carry out documentation and communication work (such as “to share our lessons about working with community members”) rather than IEC work (such as “to raise awareness about HIV/AIDS in the community”).
- ! Encourage participants to think of both:
 - Internal reasons to carry out documentation and communication work (such as “to improve our NGO’s/CBO’s programmes”).
 - External reasons (such as “to share our lessons with other NGOs/CBOs”).
- ! Encourage participants to think of both:
 - Organisational reasons to carry out documentation and communication work (such as “to raise our NGO’s/CBO’s profile”).
 - Programmatic reasons (such as “to know if our project is working”).
- ! Help participants to think strategically about where to place their reasons on the ranking line. For example, discourage them from placing all of them under “very important”, and to instead think about which are more important than others.

Example: Local NGOs/CBOs and District Health Management Teams (DHMTs), Zambia

During a skills-building workshop for local NGOs/CBOs and DHMTs in Zambia, participants brainstormed their reasons for carrying out documentation and communication. They then wrote each one on a separate sheet of paper and placed them along a “ranking line” according to their importance.

Not important

- ✓ To keep records for our archives.
- ✓ To have something for presentations at conferences.
- ✓ To fill the pages of our reports.

Quite important

- ✓ To check on the process of our work.
- ✓ To prove that work is being done.
- ✓ To share information with others.
- ✓ To monitor our planned activities.

Very important

- ✓ To maintain the direction of our programme.
- ✓ To keep practical records for future use.
- ✓ To use in future project proposals.
- ✓ To help in our planning work.
- ✓ To help in our monitoring work.

Afterwards, the facilitator led a discussion about what had been learned from the activity, for example about how there are both internal and external reasons to carry out documentation and communication.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



Ask participants to brainstorm the two to three priority reasons why documentation and communication is important for their NGOs/CBOs.



1.3. Aim: To develop a broad understanding of audiences for documentation and communication work

Introduction

Having decided what documentation and communication is and why it should be done, an NGO/CBO needs to think about who they do it for.

Documentation and communication can be carried out for many different audiences, including:

- Existing ones (such as a current donor) and potential ones (such as a new donor).
- Internal ones (such as NGO/CBO staff) and external ones (such as other NGOs/CBOs).
- Individuals (such as the Minister for Health) and whole sectors (such as health professionals).

In practice, each documentation and communication product needs to have a specific audience. However, as a starting point, NGOs/CBOs need to think about all of the potential audiences that could be reached through their work.

Instructions

Timing: 1 hour

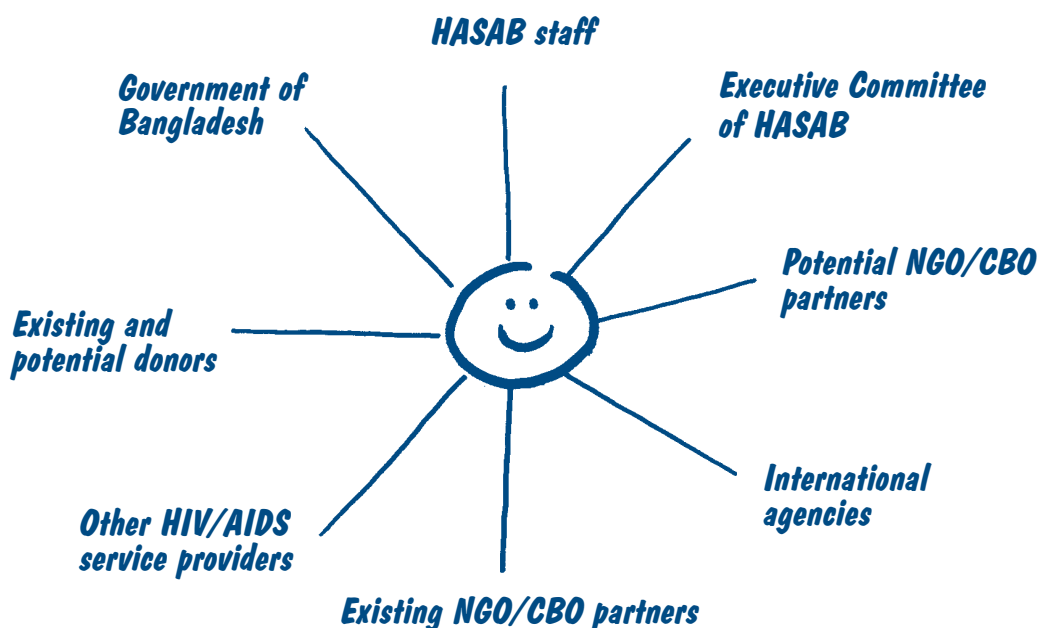
- 1** Explain the aim of the activity.
- 2** Ask participants to work individually and to think of all the possible audiences for their documentation and communication work. Ask them to write down each audience on a separate small piece of paper.
- 3** On a very large piece of flipchart paper, draw a small circle to form the centre of a “sunburst map”. Add several lines coming out from the circle – as if to represent the sun’s rays.
- 4** Ask for a volunteer to read out one of their audiences and to explain why they chose it. Ask them to get up and place the piece of paper at the end of one of the sunrays (see Example). Encourage the other participants to ask questions and to make comments.
- 5** Ask the group if other participants have written the same audience on one of their pieces of paper. If they have, ask them to get up and place their pieces of paper on top of the one already on the sunburst map.
- 6** Ask for a second volunteer. Repeat the process until everyone has placed all of their audiences on the map. Add as many sunrays as are needed.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the advantages and disadvantages of having many audiences for documentation and communication work?
 - ? How might different audiences benefit from an NGO's/CBO's documentation and communication work?
 - ? What is the difference between an audience for documentation and communication work, and one for IEC work?

Facilitators' notes

- ! Encourage participants to think broadly about potential as well as existing audiences. Help them to focus on who their audiences should or could be – rather than who they have been to date.
- ! Ensure that participants do not identify audiences for IEC, but instead focus on audiences for documentation and communication. For example, while “children in school” might be an audience for IEC, “education authorities” or “donors” would be more suitable audiences for documentation and communication.
- ! If some participants have similar but not identical audiences, encourage them to discuss how they should be placed on the map. For example, they might be similar enough to be grouped together at the end of one sunray, or different enough to be placed separately. This will help the participants to define exactly who their audiences are.

Example: HIV/AIDS STD Alliance of Bangladesh (HASAB), Bangladesh

HASAB is an HIV/AIDS NGO/CBO support organisation. At a training workshop for staff, participants worked individually to think of audiences for documentation and communication, and then wrote them down on separate pieces of paper. Then one volunteer read out one of their audiences, explained why they had chosen it, and placed the relevant piece of paper at the end of a sunray on a sunburst map. If others had the same audience, they placed their pieces of paper on top of the first one. The participants continued this process until everyone had shared all of their audiences. The completed map gave a picture of all of their combined ideas.



The facilitator then led a discussion about what had been learned from the activity, for example about how it can be an advantage to have many audiences for documentation and communication (as it means reaching more people), but also a disadvantage (as the work is not written to meet the specific needs of each one).

(Reference: Adapted from a workshop on “Documentation and Communication”, HIV/AIDS STD Alliance of Bangladesh and the International HIV/AIDS Alliance, Bangladesh, June 1999.)

ACTIVITY SHORTCUT

Ask participants to list all their possible audiences for documentation and communication work.

1.4. Aim: To develop a common understanding of what makes good documentation and communication

Introduction

Documentation and communication that is interesting and well thought through has the most impact. Therefore, NGOs/CBOs need to consider how to record and present their work as creatively and effectively as possible.

Good documentation and communication does not need to be expensive or complicated. Instead, it needs to be appropriate and of good quality – in terms of style, format, content and accuracy.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Ask the participants to divide into pairs.
- 3** Give an example of a written documentation and communication product – such as a policy report or a case study – to each pair of participants. Ask them to look through it and to identify its strengths and weaknesses.
- 4** Bring everybody back together. Ask each pair to share with the rest of the group the strengths and weaknesses that they identified in their product. Write the key points in two columns on a flipchart (see Example).
- 5** Ask the group if anyone has other “strengths” and “weaknesses” to contribute based on their own experiences of documentation and communication products. Encourage the participants to ask each other questions and to make comments.
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the two to three most important elements of a good documentation and communication product?
 - ? How important is the structure and format of a product? Why?
 - ? What kinds of visuals improve different kinds of documentation and communication products?



Participants at a workshop in the Philippines discussing what makes documenting and communicating their HIV/AIDS work “different”.

Facilitators' notes

- ! Be careful to provide examples of documentation and communication materials (such as annual reports and policy reports) rather than IEC materials (such as leaflets about condoms and flipcharts about STIs).
- ! Consider the arguments for and against using products developed by external organisations (to avoid participants feeling defensive) or ones by participants (to make the activity more "real").
- ! Use products of varied quality – so that different strengths and weaknesses can be identified.
- ! Adapt this activity to participants' skills and resources. For example, if appropriate, you may want to include examples of videos or websites.

Example: Local NGOs/CBOs, the Philippines

At a skills-building workshop for local NGOs/CBOs, participants worked in pairs and were each given an example of a written documentation and communication product. The participants were asked to review the product and to report back on its strengths and weaknesses.

Strengths of documentation and communication products	Weaknesses of documentation and communication products
<ul style="list-style-type: none"> ✓ Provides information from different sources. ✓ Provides brief and concise information. ✓ Uses quotes from the participants in the project. ✓ Has a "catchy" title. ✓ Has a good balance between text and visuals, including symbols, drawings and graphics. ✓ Looks interesting, and is colourful and attractive. ✓ Is informative for the target audience. ✓ Uses simple language. ✓ Is well organised and laid out. ✓ Has a clear aim. 	<ul style="list-style-type: none"> ✗ Is too structured and "bookish". ✗ Is limited to one very specific target audience. ✗ Has too much wasted space. ✗ Uses a font that is too small to read easily. ✗ Is too detailed – making it difficult to know what the key points are. ✗ Has text and visuals that don't match. ✗ Lacks details about how to access the services of the organisation. ✗ Has no conclusion.

Afterwards, the facilitator led a discussion about what had been learned from the activity, for example about how good documentation and communication products combine effective design with strong content.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Philippines HIV/AIDS NGO/CBO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



Ask participants to list the three to four key "strengths" of good documentation and communication products, and the three to four key "weaknesses" of bad products.



1.5. Aim: To review past documentation and communication work in order to improve future work

Introduction

One important way for an NGO/CBO to prepare for its future documentation and communication work is by learning from its past work.

Almost all NGOs/CBOs have already carried out some degree of documentation and communication work. Looking at the “ups” and “downs” of these experiences can help them to see how much work they have done in this area to date. More importantly, it can help them to learn from what has or has not gone well.

Useful criteria for deciding if past documentation and communication work has been successful include:

- Was it clearly thought through?
- Was it timely?
- Was it useful for its audience?

Instructions

Timing: 1 hour

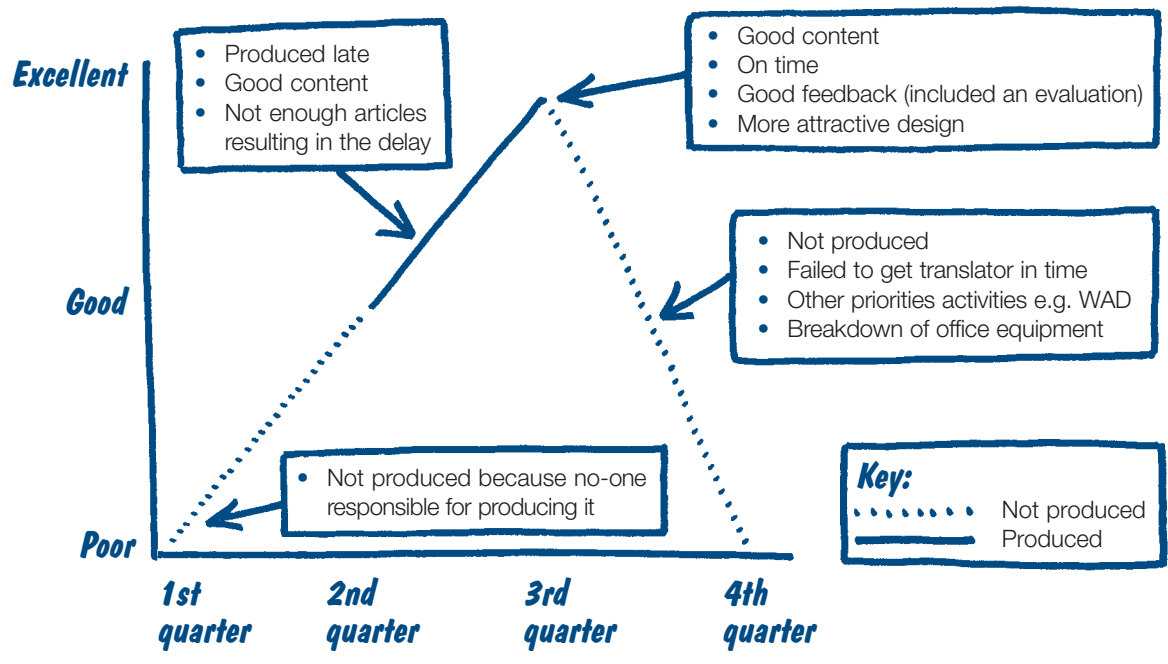
- 1** Explain the aim of the activity.
- 2** Divide the participants into small groups so that they are working with colleagues from their own NGO/CBO.
- 3** Ask the groups to draw a “timeline” – with a horizontal line across the bottom divided into a timescale (such as 1998, 1999 and 2000) and a vertical line down the left-hand side divided into a measure (such as “poor”, “good” and “excellent”).
- 4** Ask the groups to discuss either their overall documentation and communication work to date or their experiences with a specific product. Whichever they choose, ask them to consider how successful they were – for example, in terms of whether the work was clearly thought through, timely and useful for its audiences.
- 5** Ask the groups to plot their work on their timeline – marking when it took place and how effective it was. For example, a successful period might appear as a high point, and an unsuccessful period as a low point. Ask them to label each dot with a brief explanation (see Example).
- 6** Ask the groups to join up the dots on their timeline – to provide an overview of the ups and downs of their documentation and communication work.
- 7** Bring everybody back together and ask the groups to present their timelines. Encourage the participants to ask each other questions and to make comments.
- 8** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? When has the NGO’s/CBO’s documentation and communication work been at its best or worst? Why?
 - ? Have there been extreme ups and downs, or a reasonably smooth path? Why?
 - ? How could the downs have been avoided?

Facilitators' notes

- ! Encourage participants to discuss why their ups and downs occurred – rather than just plot them on the timeline. This will help them to learn from their experiences and to improve their future work.
- ! Encourage participants to focus on the quality of their documentation and communication work, rather than the quantity. For example, help them to look at whether a report met its aims rather than how many copies were distributed.
- ! If participants are new to their NGOs/CBOs or are from NGOs/CBOs with little documentation and communication experience, encourage them to focus on the ups and downs of one individual product, rather than attempting an overview of their work.

Example: Traditional and Modern Health Practitioners Together Against AIDS and Other Diseases (THETA), Uganda

THETA is a local NGO involved in responses to HIV/AIDS. At a skills-building workshop, they shared the ups and downs of the development of their quarterly newsletter to date. They did this by drawing a timeline. On this, they plotted failing to produce their newsletter as a low point, and producing their annual report and receiving positive feedback as a high point. They then used their timeline to discuss how they could improve their future documentation and communication work.



Afterwards, the facilitator led a discussion about what had been learned from the activity, for example about how downs in documentation and communication could be avoided through better planning.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Uganda Network of AIDS Service Organisations and the International HIV/AIDS Alliance, Uganda, March 2001.)



Ask participants to identify two good experiences and two bad experiences from their past documentation and communication work and to consider what they learned from them.



1.6. Aim: To identify what skills an NGO/CBO needs to carry out documentation and communication work

Introduction

Before planning documentation and communication, an NGO/CBO needs to identify what skills it needs to carry out this work effectively and efficiently.

Documentation and communication skills include:

- Listening
- Analysing
- Collecting data
- Editing
- Recording
- Writing
- Prioritising
- Designing
- Word processing
- Planning
- Drawing

Different people in an organisation have different skills to contribute to documentation and communication work. It is useful for an NGO/CBO to think about the overall skills that they will need to carry out their work, to identify their relevant strengths and weaknesses, and to develop ways to address any gaps.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a group brainstorm about the types of skills needed for documentation and communication work. Write the key points on a flipchart.
- 3** Ask the participants to divide into groups so that they are working with colleagues from their own NGO/CBO.
- 4** Ask each group to draw a grid with three vertical columns entitled “Skills needed for our documentation and communication work”, “Our strengths and weaknesses of each skill”, and “Action to take to build each skill”.
- 5** Ask each group to fill in the grid by:
 - Identifying what combination of skills their NGO/CBO will need to carry out its documentation and communication work.
 - Assessing their existing strengths and weaknesses in those skills.
 - Deciding what action to take to address any gaps (see Example).
- 6** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion on what has been learned from the activity, based on questions such as:
 - ? What are the priority skills for an NGO/CBO carrying out documentation and communication work?
 - ? If an NGO/CBO does not have a specific documentation and communication skill, should it try to gain it or focus on what it can already do well?
 - ? What skills does an NGO/CBO need to have within its organisation and what can it access from other organisations?
 - ? How can an NGO/CBO build skills as an organisation rather than among one or two individuals?

Facilitators' notes

- ! Create a supportive environment for this activity – so that participants feel comfortable talking about their NGO's/CBO's weaknesses as well as strengths.
- ! Encourage participants to focus on skills rather than resources (such as money or equipment).
- ! Encourage participants to think realistically about the type of documentation and communication work that their NGO/CBO might do, and the type of skills they will need. For example, developing skills such as video production will not be useful unless the NGO/CBO is certain that videos will be relevant to their work.
- ! Support participants to identify the type of skills their NGO/CBO needs, as well as the level of skill required. For example, for an area such as design, encourage them to think about whether they need to have an "expert" or someone with a basic understanding.

Example: Uganda Network of AIDS Service Organisations (UNASO), Uganda

UNASO is a national networking organisation. At a training workshop, they identified the skills that their organisation would need to carry out documentation and communication work, including:

- Data collection
- Research
- Analysis
- Computers
- Presentation
- Observation
- Reporting
- Summarising
- Organising information
- Design
- Photography
- Interviewing

They then assessed their strengths and weaknesses in relation to each of the skills, and identified actions to take to address their weaknesses. For example:

Skills needed for our documentation and communication work	Our strengths and weaknesses of each skill	Action to take to build each skill
Data collection	<ul style="list-style-type: none"> • We have a consultant who compiles and collates the information for us. • We need to expand our techniques for collection. 	<ul style="list-style-type: none"> ! Explore training opportunities for relevant personnel. ! Write clear terms of reference so that the person responsible can expand his/her methods.
Analysis	<ul style="list-style-type: none"> • Our analysis involves a Good Practice Task Force that analyses our information and provides good insights. • The members of the Task Force are busy and have other priorities. 	<ul style="list-style-type: none"> ! Employ staff with some relevant skills. ! Give the Task Force advance warning about when their services will be needed.

Afterwards, the facilitator led a discussion about what had been learned from the activity, including how a broad range of skills – including data collection, planning and writing – are useful for documentation and communication work.

(Reference: Adapted from a Workshop on "Documentation and Communication of HIV/AIDS Work", Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



Ask participants to identify the three to four key skills that their NGO/CBO will need for documentation and communication work, and what action is needed to build those skills.

1.7. Aim: To develop a common understanding of what specific issues should be considered for documentation and communication of HIV/AIDS work

Introduction

Documenting and communicating HIV/AIDS activities can be similar to that of any other area of community development work. However, there are also some specific issues for NGOs/CBOs to consider.

HIV/AIDS can involve highly sensitive issues, about areas such as people's social and sexual lives. It can also involve complex information, such as HIV infection rates and medical information about HIV/AIDS. Therefore, NGOs/CBOs need to consider how to record and present their experiences in a way that is not only interesting and easy to understand but also respects those involved and is technically accurate.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a group brainstorm about what issues make documentation and communication of HIV/AIDS work "different". Write the key points on a flipchart.
- 3** Divide participants into small groups – preferably so that people are working with colleagues from their own NGO/CBO.
- 4** Ask each group to develop a set of guidelines to address these issues for their future documentation and communication of HIV/AIDS work (see Example).
- 5** Bring everybody back together and ask the groups to present their guidelines. Encourage the participants to ask each other questions and to make comments.
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:

- ? In what way is documentation and communication of HIV/AIDS work different from that of other areas of community development?
- ? Are there any strict dos and don'ts about documenting and communicating HIV/AIDS work?
- ? How can the guidelines be put into practice?



Participants at a workshop in Zambia reviewing the strengths and weaknesses of publications.

Facilitators' notes

- ! Help participants to address how their documentation and communication work could help to decrease stigma in their communities and countries. For example, support them to develop ways to present those who may be marginalised – such as people living with HIV/AIDS or injecting drug users – in a positive light.
- ! Encourage participants to develop guidelines that are realistic as well as ethical. For example, encourage them not to be so strict that they make their work impossible.

Example: Local NGOs/CBOs, the Philippines

At a training workshop, local NGOs/CBOs involved in HIV/AIDS brainstormed the key issues that make documentation and communication of HIV/AIDS work “different”.

What makes documentation and communication of HIV/AIDS work different?

- It is a very sensitive subject.
- It involves issues around confidentiality.
- It involves peoples' private and sexual lives.
- It is a political issue.
- It is a global issue.
- It is a technical issue – with a lot of jargon and complex information.
- It is an issue full of stigma and discrimination.

Based on these issues, the participants then developed a set of guidelines to help them in their future documentation and communication of HIV/AIDS work.

Guidelines for documenting and communicating our HIV/AIDS work

- 1 Be gender and culture sensitive.
- 2 Use politically correct language.
- 3 Always check the accuracy of information and data.
- 4 Uphold and promote human rights.
- 5 Use local language that cannot be misinterpreted.
- 6 Ensure that whoever is producing our documentation and communication is knowledgeable about HIV/AIDS.

The facilitator then led a discussion about what had been learned from the activity, for example that it is vital to maintain confidentiality in documentation and communication work on HIV/AIDS.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Philippines HIV/AIDS NGO/CBO Support Program and International HIV/AIDS Alliance, the Philippines, September 2000.)

ACTIVITY SHORTCUT

Ask participants to identify three absolute “dos” and three absolute “don’ts” for documenting and communicating HIV/AIDS work.

Making a plan for a documentation and communication product

Section 2

Contents

	Making a planning framework and grid	28
2.1	Planning Step 1: Deciding an aim and objectives	30
2.2	Planning Step 2: Identifying priority audiences	32
2.3	Planning Step 3: Choosing key messages	34
2.4	Planning Step 4: Selecting a product	36
2.5	Planning Step 5: Developing the product	38
	5A: What structure, content and style will the product have?	38
	5B: How will the product be prepared and produced?	40
	5C: Who will do the work?	42
	5D: When will the work be done?	44
2.6	Planning Step 6: Disseminating the product	46
2.7	Planning Step 7: Monitoring and evaluating the product	48
2.8	Finalising the plan	50
	Handouts	52 – 54

Summary of Section 2

Section 2 of this toolkit helps NGOs/CBOs to prepare a detailed plan for a **specific documentation and communication product**.

This section starts by supporting NGOs/CBOs to develop a planning framework – showing the type and order of steps to take. It then guides NGOs/CBOs through each step, including selecting an aim and objectives, priority audiences, key messages and a product. It then provides in-depth support in how to develop a specific product, including attention to structure, content and style, preparation and production, who will do the work, and when it will be done. It then covers disseminating, monitoring and evaluating the product. Section 2 ends by helping NGOs/CBOs to take a step back in order to review and finalise their plan.

This section is important because it helps NGOs/CBOs to think through all the steps involved in developing documentation and communication products. It encourages groups to be creative, but also strategic and realistic. This helps to ensure that their efforts will bring concrete benefits to their organisation and its HIV/AIDS work.

(Note: This section requires that **participants work in the same groups, with colleagues from their own NGO/CBO, throughout all of the activities**. This is because developing a documentation and communication plan is specific to each NGO/CBO and is a step-by-step process of collaboration.)



2. Aim: To make a planning framework and planning grid for a specific documentation and communication product

Introduction

To develop a specific documentation and communication product, it is useful for an NGO/CBO to develop and follow a plan.

One way to start this process is to develop a planning framework – which provides an outline of the steps to take. It ensures that each step is thought through and contributes to a strong overall plan. A framework can be arranged in a number of different ways, according to the needs of NGOs/CBOs and the processes that they are used to.

Once finalised, a planning framework can be documented in the form of a planning grid. This is a simple way of recording the key details – to ensure that the information can be shared within an NGO/CBO and with others.

Instructions

Timing: 45 minutes

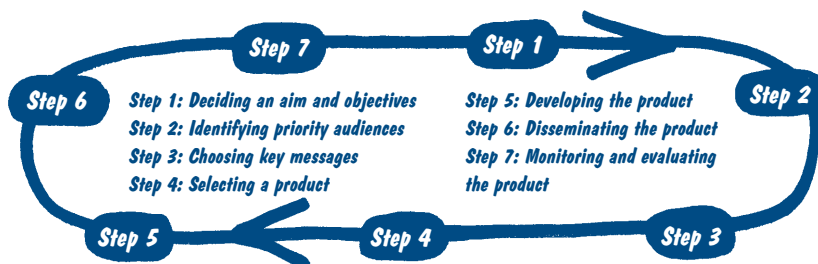
- 1** Explain the aim of the activity.
 - 2** Facilitate a discussion about what is meant by a planning framework, and why it is important for documentation and communication work.
 - 3** Divide participants into NGO/CBO groups – so that people are working with colleagues from their own organisation. Ask each group to make a set of seven cards with one of the following planning steps written on each:
 - Developing the product.
 - Monitoring and evaluating the product.
 - Deciding an aim and objectives.
 - Choosing key messages.
 - Disseminating the product.
 - Identifying priority audiences.
 - Selecting a product.
- Also ask them to prepare two blank cards.
- 4** Ask the groups to arrange the cards as a planning framework – meaning in the order and shape that makes sense to them. Ask them to use the blank cards to add any steps that they feel are missing (see Example).
 - 5** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
 - 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is a framework needed for a documentation and communication plan?
 - ? Is it obvious which steps should come before others? Why?
 - ? Is this framework similar to those for other areas of the NGO's/CBO's planning work?
 - 7** Facilitate a discussion about what is meant by a planning grid, and why it is important for documentation and communication work.
 - 8** Present an example of a planning grid to participants. (See Example, and also the Handout at the back of Section 2 which can be photocopied, or made into an overhead transparency or copied onto a flipchart.)
 - 9** Support the groups to develop their own planning grids based on their planning frameworks. Make it clear that they can use their own planning frameworks and grids after the workshop, but during the workshop the toolkit grid will be used.
 - 10** Ask each group to make a large version of the planning grid (as shown on the Handout at the back of Section 2) using flipchart paper.

Facilitators' notes

- ! Ensure that participants develop a planning framework for documentation and communication work, and not for IEC work. Remind participants of the difference between the two (see Section 1.1).
- ! If participants decide to add planning steps, advise them to limit the total to eight to avoid the process becoming too complicated.
- ! Encourage participants to develop whatever shape of framework suits them. For example, they may prefer to place the steps in a straight line or as a "staircase".
- ! **Please note that the rest of this section follows the number and order of planning steps shown in the grid in the Example below.** Therefore:
 - Before facilitating this activity, ensure that you have read the whole of Section 2 and are familiar with these steps – so that you understand why this approach and order has been suggested.
 - Take the time to explain to participants the logic of the approach and order and to clarify that the workshop will follow this order.

Example: Local NGOs/CBOs and District Health Management Teams (DHMTs), Zambia

In a training workshop for local NGOs/CBOs and DHMTs involved in HIV/AIDS, participants discussed what is meant by a planning framework and why it is important for documentation and communication work. They were then given seven cards with planning steps written on them, and two blank cards. They arranged the seven cards in the order and shape that suited them – which took the form of a clockwise circle. This showed that some steps need to come before others, but that the planning process is ongoing. They did not use the blank cards, because they felt that no steps were missing.



Participants then discussed what was meant by a planning grid and why it is important for documentation and communication work. They then developed a planning grid on which to record the information for each step of the planning framework (see below).

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

The facilitator then led a discussion about what had been learned from the activity, such as how a planning framework is needed to ensure that documentation and communication work is focused.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



Present participants with the documentation and communication planning framework and grid shown in the Example. Ask them to discuss whether they agree with the number and order of the steps.



2.1. Aim: To decide the overall aim and objectives for an NGO's/CBO's documentation and communication work, and to select one objective on which to focus

Introduction

The first step of a documentation and communication plan is to decide an overall aim and objectives. This will help to make sure that an NGO's/CBO's work is focused.

A documentation and communication aim describes how the NGO's/CBO's documentation and communication work will contribute to their organisational missions. Documentation and communication objectives are the different areas of work or strategies that an NGO/CBO will undertake to achieve its documentation and communication aim. Objectives should be:

- | | |
|---------------------|---|
| S pecific | – in relation to stating what will be done |
| M easurable | – in relation to monitoring and evaluation |
| A ppropriate | – in relation to the organisation's vision, mission and goals |
| R ealistic | – in relation to the organisation's potential capacity and experience |
| T ime-bound | – in relation to when the work will be done |

Instructions

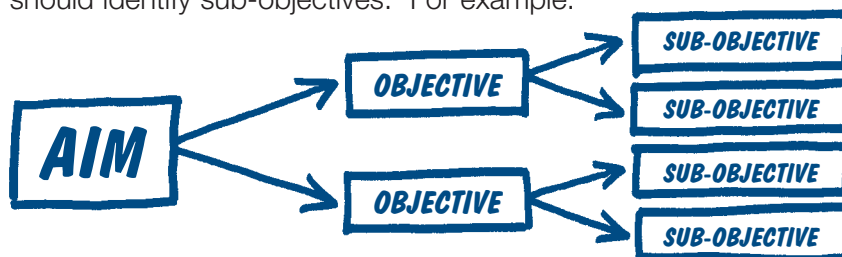
Timing: 1 hour, 30 minutes

- 1** Explain the aim of the activity.
- 2** Divide the participants into their NGO/CBO groups. Ask each group to start by reviewing their NGO's/CBO's mission and identifying how documentation and communication work could support it.
- 3** Facilitate a discussion about the meaning of the word "aim", and why deciding an aim is the first step in planning documentation and communication work.
- 4** Facilitate a discussion about the meaning of the word "objective", and why an objective needs to be SMART (see above).
- 5** Ask each group to decide the overall aim for their NGO's/CBO's documentation and communication work. Ask them to summarise it in a sentence starting with: "The aim of our documentation and communication work is to" (see Example).
- 6** Ask each group to decide their NGO's/CBO's objectives for documentation and communication work. The objectives should help achieve the documentation and communication aim.
- 7** Ask each group to identify a priority objective – namely the one that they will focus on for their plan. Ask them to underline it.
- 8** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 9** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? How is documentation and communication linked to the NGO's/CBO's mission?
 - ? Why is it important to decide an aim before deciding on audiences and products?
 - ? Are the objectives appropriate and realistic for the NGO/CBO?
- 10** Ask each group to write their aim and objectives under the first column of their documentation and communication planning grid:

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

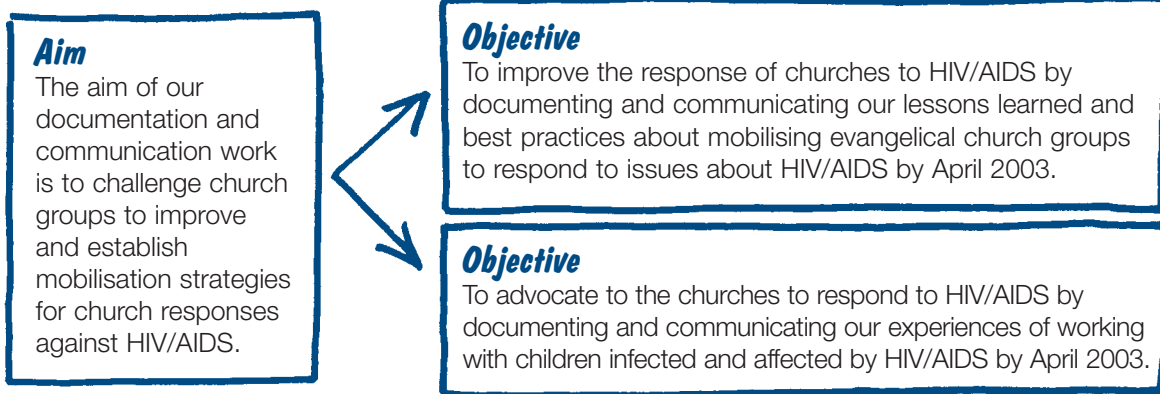
Facilitators' notes

- ! Remind participants that the mission is central to their NGO/CBO – namely the reason why it exists. Encourage them not just to read out a written mission statement, but also to discuss what it means to them in practice.
- ! Help participants to decide a timescale for their documentation and communication plan that fits their NGO's/CBO's overall planning cycle. Help them to consider how this timescale might affect their aim and objectives.
- ! Ensure that participants develop an aim and objectives for documentation and communication work, and not for IEC work. If necessary, clarify the difference between the two (see Section 1.1).
- ! If participating NGOs/CBOs carry out a lot of documentation and communication work, they may want to explore a further level of detail before selecting a priority objective. To do this they should identify sub-objectives. For example:



Example: The AIDS Intervention Project (TAIP), Uganda

TAIP is a local NGO responding to HIV/AIDS. At a training workshop, they reviewed their organisational mission. They then discussed the meaning of the word aim and developed an overall aim for their documentation and communication work. They did the same for objectives, before summarising their ideas in brief sentences. Finally, they identified and underlined which of their objectives was their priority.



Afterwards, the participants agreed that an aim should be decided before audiences and products are identified so that the NGO's/CBO's work is as strategic and appropriate as possible.

Finally, TAIP wrote their decisions about deciding an aim and objectives under the first column of their documentation and communication planning grid. They underlined the objective that they had chosen as their priority.

(Reference: Adapted from a Workshop on "Documentation and Communication of HIV/AIDS Work", Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



Present the definition of an aim and "SMART" objectives (see opposite page). Ask participants to decide the overall aim and objectives for their documentation and communication plan, and to identify a priority objective to focus on.



2.2. Aim: To identify the priority audiences for a chosen documentation and communication objective

Introduction

Having decided on an aim and priority objective, an NGO/CBO needs to identify the audiences for their documentation and communication objective.

An audience is who an NGO/CBO wants to reach through its documentation and communication work. It is the target – meaning the person, organisation or sector that they want to communicate with and inform.

There are many possible audiences for documentation and communication work (see Section 1.3). However, an NGO/CBO needs to prioritise them – so that its work can be developed with a specific target in mind. It also needs to decide how many people it wants to reach within its audience.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Divide the participants into their NGO/CBO groups. Ask each group to brainstorm audiences for their documentation and communication objective. Ask them to write each one down on a separate piece of paper.
- 3** Ask each group to draw an “audiences map”, starting by writing their NGO/CBO in the centre. Ask them to place their audiences on the map according to their importance. For example, important audiences should be placed close to their NGO/CBO and less important ones further away (see Example).
- 4** Ask the groups to prioritise their audiences – by keeping only the one to four most important ones on the map, and putting the others to one side. Ask them to decide how many people they want to reach within each of its audiences.
- 5** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Are the audiences suitable for documentation and communication work? Or are they more suitable for IEC work?
 - ? Do the audiences clearly link to the aim and objectives?
 - ? What are the advantages and disadvantages of having several audiences?
 - ? What difference does it make how many people an NGO/CBO wants to reach within each audience?
- 7** Ask the groups to write their priority audiences under the second column of their documentation and communication planning grid. See below.

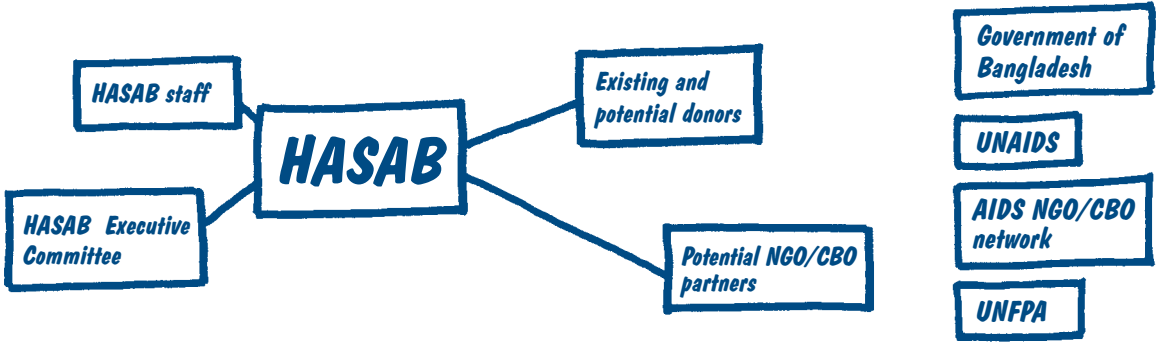
Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Encourage participants to be as specific as possible – for example, thinking of audiences that are real-life people or institutions rather than general sectors.
- ! Help participants to limit their priority audiences to no more than four. If they are keen to have more, encourage them to think about how this might affect the focus of their work.
- ! Ask participants to write the names of their audiences in full rather than use acronyms. This will make their plans easier for other people to understand.
- ! Support participants to select audiences that are suitable for documentation and communication work rather than IEC. If necessary, clarify the difference between the two (see Section 1.1).

Example: HIV/AIDS/STD Alliance of Bangladesh (HASAB), Bangladesh

HASAB is an HIV/AIDS NGO support programme in Bangladesh. During a training workshop for staff, they brainstormed possible audiences for their documentation and communication work, and wrote them down on separate pieces of paper. They then drew an audiences map – starting with their NGO/CBO at the centre and then putting their audiences in appropriate places around them. For example, they placed the most important audiences nearest to themselves. Afterwards, HASAB highlighted their priority audiences – by keeping the four most important ones on the map, and removing the others to one side. This helped them to be clear about exactly who their documentation and communication would be aimed at. They then decided how many people within each audience they would like to target.



Afterwards, the facilitator led a discussion about what had been learned from the activity, such as the fact that, if priority audiences are not identified, products become less focused and have less impact.

Finally, HASAB wrote their decisions about identifying priority audiences under the second column of their documentation and communication planning grid.

(Reference: Adapted from "Documentation and Communication Workshop", HIV/AIDS STD Alliance of Bangladesh and the International HIV/AIDS Alliance, Bangladesh, June 1999.)



Ask participants to decide one to four priority audiences for their chosen documentation and communication objective.



2.3. Aim: To choose key messages for the selected documentation and communication objective

Introduction

Having decided an aim, chosen objective and priority audiences, an NGO/CBO needs to decide on the key messages to use.

Key messages are the most important ideas that an NGO/CBO wants to communicate. They are the key points that will remain in people's minds after they have read a report, watched a video or listened to a cassette.

Key messages need to be:

- Inspiring
- M**emorable
- P**ositive
- A**ttention-grabbing
- C**lear
- T**aken from practical experience

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what is meant by key messages, and why they need to have IMPACT (see above).
- 3** Divide the participants into their NGO/CBO groups and ask them to discuss the main points that they want to communicate to the priority audiences for their chosen documentation and communication objective.
- 4** Ask the groups to summarise their points – in the form of three to four key messages (see Example).
- 5** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Are the key messages relevant for the NGO's/CBO's chosen objective?
 - ? Are the key messages as clear as possible?
 - ? Are the key messages convincing for the chosen audiences?
 - ? Will the key messages be understood and agreed throughout the NGO/CBO?
- 7** Ask the groups to write their key messages under the third column of their documentation and communication planning grid. See below.

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Support participants to keep their messages as simple as possible, and to avoid using jargon and acronyms.
- ! Help participants to see how, even if the general content of their messages remains the same, their wording and “pitch” needs to be adapted to different audiences.
- ! If participants find it difficult to develop strong key messages, it may help to carry out a role-play. One person can act as a representative of the NGO/CBO and the other as a representative of their priority audiences (such as a donor or a government official). The first person needs to convince the second – by trying out their key messages.
- ! Ensure that participants develop documentation and communication messages (such as “Condom use among young people has doubled through involving them in our life-skills project”) rather than IEC messages (such as “Young people: use a condom when you have sex”).

Example: Community Health and Development Inc (ComDev), the Philippines

ComDev is a community development NGO that works with young people. At a training workshop, they discussed the main points about reproductive health to communicate to the audiences for their documentation and communication objective. They then summarised them as three key messages.

Key messages:

Reproductive health and young people in General Santos city

- 1** Peers can be effective in influencing behaviour change among other young people.
- 2** Young people are involved in commercial sex in our city, and need support.
- 3** Economic development in our city has exposed young people to situations that threaten their reproductive health.

Afterwards, the facilitator led a discussion about what had been learned from the activity, such as the fact that key messages need to represent the opinions of an NGO/CBO as a whole and not just the people carrying out the documentation and communication work.

Finally, ComDev wrote their decisions about choosing key messages under the third column of their documentation and communication planning grid.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Philippines HIV/AIDS NGO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



Ask participants to identify three or four key messages to communicate to the priority audiences of their chosen documentation and communication objective.



2.4. Aim: To select a product for a chosen documentation and communication objective

Introduction

Having identified its priority audiences and key messages, an NGO/CBO needs to select an appropriate documentation and communication product.

Products are the documentation and communication materials that an NGO/CBO develops. There are many different types, depending on the needs and resources of an NGO/CBO. Examples include:

- Case studies
- Newsletters
- Leaflets
- Photo-story books
- Websites
- Videos
- Policy reports
- Workshop reports
- Presentations
- Abstracts
- Annual reports
- Radio programmes

As well as deciding what type of product to develop, an NGO/CBO needs to decide how many it wants to produce. This will depend on the number of people that it wants to reach.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what is meant by a documentation and communication product, and list examples.
- 3** Divide the participants into their NGO/CBO groups and ask them to identify three to four criteria to decide the usefulness and appropriateness of products that they have listed. Examples might include “Suits our skills” or “Suits our budget”.
- 4** Ask the groups to develop a “ranking grid” – by writing the products that they have identified in a column down the left-hand side and their criteria as the headings of columns along the top (see Example).
- 5** Ask participants to address each product in turn and to score it against the criteria. For example, they might give one point (✓) for a product that is not useful and appropriate, two points (✓✓) to one that is quite useful and appropriate, and three points (✓✓✓) to one that is very useful and appropriate.
- 6** When the process is complete, ask the groups to identify their most useful and appropriate product – by adding up the points and seeing which has achieved the highest score.
- 7** Ask the groups to decide how many copies of the product they would like to produce – depending on the number of people that they want to reach.
- 8** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 9** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Is there a clear link between the product and the chosen objective and audiences?
 - ? Is the product suitable for documentation and communication work or for IEC?
 - ? What difference does it make how many copies of the product will be produced?
 - ? Is the product realistic for the NGO’s/CBO’s resources?
- 10** Ask the groups to write their selected product in the fourth column of their documentation and communication planning grid:

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Ensure that participants develop good criteria that reflect the issues that matter to their NGO/CBO. Emphasise that the criteria will form the basis of their decision-making about which product to choose.
- ! Ensure that participants select documentation products (such as annual reports or policy reports) rather than IEC products (such as leaflets about condom use or flipcharts about STIs).
- ! Help participants to be creative about possible products. For example, support them to think beyond just written reports, and to consider other options (such as web sites and radio programmes).
- ! Support participants to be realistic about their product. Ask them probing questions about whether they will have enough budget, skills and time to develop it.

Example: Copperbelt Health Education Project (CHEP), Zambia

CHEP is a local NGO involved in HIV/AIDS prevention and care. At a skills-building workshop, they listed possible documentation and communication products. They then prioritised them by using a “ranking grid”. This used criteria – such as “suits our budget” – and a scoring system. While they gave one point (✓) for a product that was not useful and appropriate, they gave two (✓✓) for one that was quite useful and appropriate, and three (✓✓✓) for one that was very useful and appropriate. CHEP then identified their priority product – namely the one with the highest score – and decided how many copies of it to produce.

Documentation and communication products	Criteria to decide usefulness and appropriateness of products				Total score
	Suits our aim, objectives and audiences	Suits our budget	Suits our skills	Suits our timescale	
Video	✓✓✓	✓✓	✓✓	✓	8
TV programme	✓✓✓	✓	✓✓	✓	7
Radio programme	✓✓✓	✓	✓	✓✓	7
Newsletter	✓✓✓	✓✓	✓✓	✓✓✓	10

Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that a product needs to be realistic – not just in terms of budget, but also in terms of time and skills.

Finally, CHEP wrote their decisions about selecting a product under the fourth column of their documentation and communication planning grid.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



Ask participants to identify three or four possible products for their documentation and communication plan. Then ask them to select which will be their priority product.



2.5A. Aim: To decide the structure, content and style of a documentation and communication product

Introduction

Having selected its documentation and communication product, an NGO/CBO needs to decide how to develop it. The first step is to decide what structure, content and style to use.

Structure and content refers to what the product will contain and in what order and format.

Style refers to how the information in the product will be presented and designed.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what is meant by structure and content, and why they are important for a documentation and communication product.
- 3** Divide the participants into their NGO/CBO groups and ask them to brainstorm the key areas of information to include in their product, and to write them down on separate cards. Then ask them to put the cards in the order that the information should appear – in the form of a structure and content outline (see Example).
- 4** Facilitate a discussion about what is meant by style, and why it is important for a documentation and communication product.
- 5** Ask the groups to brainstorm what style they want for their product and to write down the key points – in the form of a style outline.
- 6** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ?** Does the structure and content outline give a clear summary of what the product will contain and in what order?
 - ?** Does the outline of style give a clear idea of the look of the product?
 - ?** What specific structure, content and style issues are vital for the NGO's/CBO's specific products?
- 8** Ask the groups to write their outlines of structure, content and style in column 5A of their documentation and communication planning grid. See below.

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Encourage participants to take their time in developing their structure and contents outline – because it will form the foundation for their whole product.
- ! After developing a brief structure and contents outline, some participants may want to develop a more in-depth one. To do this, follow the same process as before, but help them to think through each point in more detail.
- ! If participants are finding it difficult to develop a style outline, it may help to carry out a role-play. During this, one person can act as a representative of their NGO/CBO and another a designer who needs to be guided in how to design the product appropriately. It is the job of the first person to describe quickly and clearly exactly how they want their product to look and feel.

Example: Tuyazyane Women's Health Club (TWHC), Zambia

TWHC is a local community group involved in HIV/AIDS prevention and care. At a training workshop, they discussed what was meant by the structure and content of a documentation and communication product. They wrote the key information to include in their product (a progress report about their CBO) down on separate pieces of paper. They then arranged the pieces of paper in the order in which the information should appear – in the form of a structure and contents outline. Afterwards, they discussed what was meant by the style of a product. They then listed the key points about how they wanted their product to look – in the form of a style outline.

Structure and contents outline

- Title and cover page
- Table of contents
- List of abbreviations
- Executive summary
- Introduction
- Aim and objectives
- Activity report for each project
- Recommendations
- Conclusion
- Annexes

Style outline

- Formal
- Six pages long
- Logo on the cover
- Margined and paragraphed text
- Numbered pages
- Underlined headings
- Pictures, tables and graphs
- Italics for quotations
- In English
- Printed in three colours
- 40 copies

Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that style outlines need to not only provide the “facts” about a product, but also give an idea about the look of the product.

Finally, TWHC wrote their decisions about structure and style under column 5A of their documentation and communication planning grid.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



Ask participants to write an outline of the information to include in their documentation and communication product. Then ask them to list three to four key points about the style of the product.



2.5B. Aim: To plan how to prepare and produce a documentation and communication product

Introduction

When an NGO/CBO has decided the structure, content and style of its documentation and communication product, it needs to plan how to prepare and produce it. This is different for each product, but usually involves four stages:

- Budgeting and preparing for the product.
- Gathering the information.
- Analysing and learning from the information.
- Turning the information into a finished product.

For all of these stages, NGOs/CBOs need to consider:

- The practical steps involved.
- The resources (including budget, people, time and skills) involved.

Instructions

Timing: 1 hour, 30 minutes

- 1 Explain the aim of the activity.
- 2 Facilitate a group discussion about what kind of stages are involved in preparing and producing a documentation and communication product, including:
 - Budgeting and preparing for the product.
 - Gathering the information.
 - Analysing and learning from the information.
 - Turning the information into a finished product.
- 3 Divide the participants into their NGO/CBO groups. Ask them to draw a detailed “cartoon strip” of all the steps at each stage of developing and producing their products – with one cartoon and caption representing each activity.
- 4 Ask the groups to number their cartoons and place them in order (see Example).
- 5 Ask the groups to identify the resources (including budget, people, time and skills) that will be required for each step. Ask them to discuss whether their NGO/CBO can provide those resources.
- 6 Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 7 Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is it important to start with an internal meeting that decides on issues such as the budget and people’s availability?
 - ? Are there any “hidden steps” that are missing? Should any of the bigger steps be broken down into smaller ones?
 - ? Are the steps truly realistic for the NGO’s/CBO’s resources?
- 8 Ask each group to write their steps for preparing and producing their product in column 5B of their documentation and communication planning grid. See below.

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Emphasise the importance of identifying the “hidden steps” in all four stages of developing their product. Examples might include negotiating a price with a printing company or checking a final text with community members. This will help them to produce a plan that is thorough and has a realistic timeframe.
- ! Ensure that participants plan the steps carefully and check their cartoons. For example, ask them to consider: What they have learned from planning this kind of work in the past; Who should be involved; What steps would improve the quality of the product.
- ! Ensure that participants realistically assess the resources (particularly money and time) that their product will involve, and whether their NGO/CBO has them.
- ! Help participants to feel at ease about drawing cartoons. Remind them that the quality of the information is far more important than the quality of the drawings.

Example: DORCAS AID, Zambia

DORCAS AID is an NGO involved in HIV/AIDS work with poor communities. At a skills-building workshop, they discussed what steps would be involved in preparing and producing a newsletter (their selected documentation and communication product). They brainstormed the practical steps and drew a cartoon strip – with one cartoon and caption for each step to be taken. Finally, they numbered their cartoons and placed them in order.

Steps to prepare and produce a quarterly newsletter



1. Office staff brainstorm on where, how and when to gather information. Decide on topical issues to be covered and the budget.



2. Staff on information collection mission to the community to gather relevant experiences on HIV/AIDS.



3. Staff in a budgeting meeting on production of newsletter – selection of printer.



4. A draft of the newsletter distributed for review to members concerned.



5. Favourable feedback received. Preparation for final print.



6. Final print being edited by staff.



7. Issue out.

DORCAS AID then identified the resources (including budget, people, time and skills) required for each step and discussed whether their NGO/CBO could realistically provide them.

Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that the biggest steps often need to be broken down into smaller ones so that an NGO/CBO has a more realistic idea of the work that will be involved.

Finally, DORCAS AID wrote their decisions about preparing and producing their product under column 5B of their documentation and communication planning grid.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)

ACTIVITY SHORTCUT

Ask participants to list their key steps for preparing and producing their documentation and communication product – including how to budget and prepare for the product, gather the basic information, analyse it, and turn it into a finished product.



2.5C. Aim: To identify who will do the work to develop and produce a documentation and communication product

Introduction

Having decided how to prepare and produce its documentation and communication product, an NGO/CBO needs to decide who will carry out the work.

It is usually best if one person leads a documentation and communication project. However, a broad range of colleagues can make a contribution. So, it is important to choose the right combination of people and skills – in the form of a documentation and communication team.

(Note: Further support in this area is provided in Section 1.6: What skills do we need for documentation and communication?)

Instructions

Timing: 30 minutes

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about how to decide who should prepare and produce a documentation and communication product. In particular, discuss who should lead such work and who should contribute to it.
- 3** Divide the participants into their NGO/CBO groups and ask them to review their cartoon strips about preparing and developing their documentation and communication product (see Step 5B). Ask them to discuss who should be involved in each step – considering issues such as people’s skills and availability.
- 4** Ask the groups to write down who should be involved in each step on small pieces of paper, and to stick them on to the relevant cartoon.
- 5** Ask the groups to underline the name of the person who will take the lead for each step.
- 6** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What mix of skills is needed for each step of preparing and producing the product?
 - ? Why is it necessary to have a lead person for each step? What should their role be?
 - ? Are people’s roles realistic – considering their other work commitments?
- 8** Ask each group to write who will do the work in column 5C of their documentation and communication planning grid. See below.

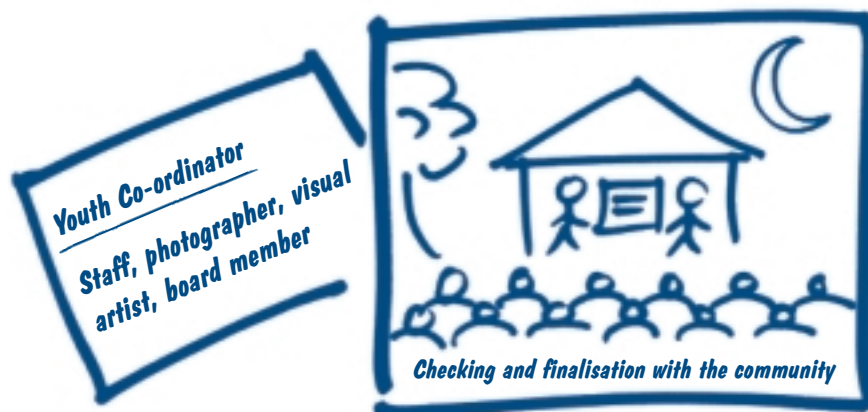
Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Support participants to start by looking at the combined skills that they will need for each step, and then by identifying the specific skills that individuals can offer.
- ! Support participants to think carefully about who is suitable to be the lead person for each step. Help them to think through issues such as: Do they have enough leadership skills? Do they have enough time? Do they have enough influence?
- ! Encourage participants to be realistic about whether people will have not only the right skills, but also the time and enthusiasm to be involved.

Example: 'The Up-lifted of the moral, economic, technological, socio-spiritual aspirations of men and women' (METSA), the Philippines

METSA is a community development group involved in HIV prevention. At a training session, staff discussed who should prepare and produce their documentation and communication product, including particularly who should lead it and who should contribute to it. They then reviewed their cartoon strip about preparing and producing their product and discussed who should be involved in each step – considering issues such as skills and availability. They wrote the names down on small pieces of paper and stuck them on to the relevant cartoons. They then underlined the name of the lead person. For example:



Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that a lead person is necessary for each step to ensure that there is overall co-ordination and that the work gets done on time.

Finally, METSA wrote their decisions about who would do the work under column 5C of their documentation and communication planning grid.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Philippines HIV/AIDS NGO/CBO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)

ACTIVITY SHORTCUT

Ask participants to decide who will take the lead and who will contribute to each step of developing and producing their documentation and communication product.



2.5D. Aim: To decide when the work for developing a documentation and communication product will be done

Introduction

When an NGO/CBO has decided who will develop its documentation and communication product, it needs to consider when the work will be done.

To decide the timing of its steps, an NGO/CBO needs to think about:

- The overall timescale of its product, including the final deadline.
- How long each step will take.
- What steps can be carried out at the same time or close together.
- The other commitments of the NGO/CBO during that time.
- The other commitments of the team members during that time.

Instructions

Timing: 1 hour

- 1 Explain the aim of the activity.
- 2 Facilitate a discussion about what is meant by a timeline, and why it is a useful tool for developing a documentation and communication product.
- 3 Divide the participants into their NGO/CBO groups and ask them to draw a timeline – which goes from their start date (i.e. when they will begin developing their product) to their end date (i.e. when they will finish their product). Ask them to mark the weeks and months in between.
- 4 Ask the groups to review the cartoon strips that they drew of the steps for developing the product (see Section 2.5, Step 5B). Ask them to write the caption of each step on their timeline – according to when the cartoon will take place. (See Example.)
- 5 Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 6 Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What does the timeline show about how realistic the plan – including the final deadline – is or is not?
 - ? What steps can be done at the same time? What steps can be done close together? What steps need time in between them?
 - ? How can participants finalise these steps within their organisations?
- 7 Ask each group to write when the work will be done in column 5D of their documentation and communication planning grid. See below.

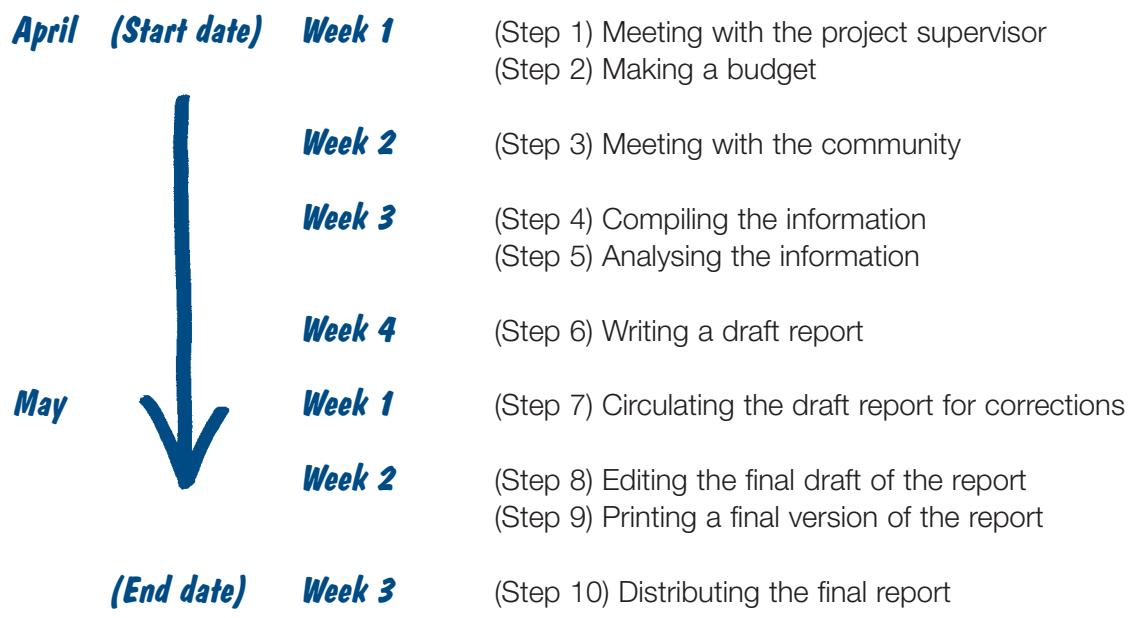
Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Help NGOs/CBOs to be very realistic about how long each step takes and which steps can or cannot be carried out at the same time. In particular, help them to consider the time that will be needed if they want to involve anyone that is external to the NGO/CBO team. For example, this might include a trustee reviewing a draft text, or a company printing a document.
- ! Help participants to develop a realistic deadline for their work – that will encourage them to work efficiently, but not put too much pressure on them.
- ! Some participants may feel overwhelmed by what seems like a lot of work in a short period of time. Support them by discussing whether their plans can be simplified, or if their final deadline can be postponed.

Example: Mambilima Health Project (MHP), Zambia

MHP is an NGO involved in community health work. At a skills-building workshop, they discussed what is meant by a timeframe, and why one is important for documentation and communication work. They then drew a timeline, marking in the months and weeks. They reviewed the cartoon strip of their steps for developing their product, then wrote the number and caption of each cartoon in an appropriate place along their timeline, according to when it should happen.



Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that, while some steps can be carried out at the same time, others need a lot of space between them.

Finally, MHP wrote their decisions about when the work would be done under column 5D of their documentation and communication planning grid.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



Ask each group to identify when each of the steps for developing their product will take place.



2.6. Aim: To decide how to disseminate a documentation and communication product

Introduction

Having developed a documentation and communication product, an NGO/CBO needs to plan how to disseminate it.

Dissemination means how the product will be distributed to the audiences that have been chosen. NGOs/CBOs often need to combine different strategies so that their dissemination will be as effective as possible. These include through:

- Mailings in the post
- Meetings
- Conferences
- Articles in journals
- One-to-one briefings
- Websites
- Special events
- Launches

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about possible strategies for disseminating documentation and communication products.
- 3** Facilitate a discussion about criteria for deciding the effectiveness and appropriateness of such strategies.
- 4** Divide the participants into their NGO/CBO groups and ask them to identify the four to six dissemination strategies and three to four criteria that are most relevant to their specific product.
- 5** Ask the groups to draw a ranking grid – by writing the dissemination strategies in a column down the left-hand side, and the criteria along the top as headings of columns (see Example).
- 6** Ask participants to score each strategy in terms of the criteria. For example, they might give one point (✓) for a strategy that is not effective and appropriate, two points (✓✓) for one that is quite effective and appropriate, and three points (✓✓✓) for one that is very effective and appropriate.
- 7** When all of the strategies have been scored, ask participants to add up the number of ticks for each one and to write the total in the final column. Ask them to identify their priority strategies – namely the two to three with the highest score.
- 8** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 9** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the advantages and disadvantages of using more than one dissemination strategy?
 - ? Are the dissemination strategies appropriate for the audiences?
 - ? How much will the priority strategies cost – in terms of time and money?
- 10** Ask each group to write their dissemination strategies under the sixth column of their documentation and communication planning grid. See below.

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Encourage participants to think of creative dissemination strategies. Support them to include, but also to think beyond, frequently used strategies, such as mailings and briefings.
- ! Encourage participants to develop selection criteria that are directly relevant to their NGO/CBO. For example, if they have a big team of volunteers, human resources might not be a problem. If they have limited funding, cost efficiency might be vital. Remind them that the activity will only be useful if their criteria are strong.
- ! Help participants to think through all of the issues relating to dissemination. For example: Will their product be free or sold? Will their product need to be advertised? Are they producing the right number of copies?

Example: Christian Missions on Mainlands (CMM), Zambia

CMM is a local NGO involved in health education with young people. At a skills-building workshop they brainstormed strategies for disseminating documentation and communication products, and criteria for prioritising those strategies. They identified the six most relevant strategies and the four most relevant criteria for their specific product – a booklet of lessons learned about working with young people on sexual health. They then used a ranking grid to score their strategies according to the criteria – giving ✓ for a not useful and appropriate one, ✓✓ for a quite useful and appropriate one and ✓✓✓ for a very useful and appropriate one. Finally, CMM identified their three priority strategies – namely the ones with the highest scores.

Dissemination strategies	Criteria for selecting dissemination strategies				Total score
	Cost efficient	Reaches our priority audiences	Quick and easy	Suits our skills	
Public functions	✓✓✓	✓✓✓	✓✓✓	✓✓✓	12
Mailing in the post	✓	✓	✓	✓	4
Seminars	✓✓	✓✓	✓	✓✓✓	8
Special events (eg. World Health Day)	✓✓	✓✓✓	✓✓✓	✓✓✓	11
Satellite meetings	✓✓✓	✓✓	✓	✓✓✓	9
Information booths at conferences	✓✓✓	✓	✓✓	✓✓	8

The participants agreed that products are easier to monitor if they only have one dissemination strategy. However, the disadvantage then is that it may not reach so many people.

Finally, CMM wrote their decisions about disseminating the product under the sixth column of their documentation and communication planning grid.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Zambia Integrated Health Programme, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)

ACTIVITY SHORTCUT

Ask participants to decide two to three priority strategies for disseminating their documentation and communication product.



2.7. Aim: To decide how to monitor and evaluate a documentation and communication product

Introduction

As part of its documentation and communication plan, an NGO/CBO needs to decide how to monitor and evaluate its product. Monitoring means keeping track of what is being done and achieved. Evaluation means assessing whether something has been successful, and what its strengths and weaknesses have been.

Indicators are ways to measure how successful something has been. They can be:

- Quantitative – meaning that they are about numbers.
For example: *“The number of reports distributed.”*
- Qualitative – meaning that they are about feelings and emotions.
For example: *“Positive feedback received about the report.”*

To monitor and evaluate a documentation and communication product, NGOs/CBOs can take three steps:

- Reviewing the aim, objective and audiences of their plan.
- Identifying indicators to know if their plan is working.
- Deciding how to collect information to measure their indicators.

Instructions

Timing: 1 hour, 15 minutes

- 1 Explain the aim of the activity.
- 2 Facilitate a brainstorm about what monitoring and evaluation means, and why it is important for documentation and communication work.
- 3 Facilitate a discussion about what is meant by qualitative and quantitative indicators.
- 4 Divide the participants into their NGO/CBO groups. Ask them to review the aim, objective and audiences of their plans. Ask them to write these down on the left-hand side of a piece of flipchart paper.
- 5 Ask each group to identify some qualitative and quantitative indicators for their product, and to write them down the centre of the piece of paper.
- 6 Ask each group to decide what steps to take to gather the information for the indicators, and to write them on the right-hand side of the piece of paper.
- 7 Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 8 Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Do the indicators link well with the aim, objective and audiences?
 - ? Will the indicators help the NGO/CBO to know what has gone wrong with their product, as well as what has gone right?
 - ? Will the steps result in the right type and amount of information needed?
- 9 Ask the groups to write how they will monitor the product under the seventh column of their planning grid:

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Facilitators' notes

- ! Adapt this activity to the level of skills of the group. For example, participants with experience in monitoring and evaluation may want to develop specific indicators for the process, output and impact of their plan. Also, some may need to develop particular types of indicators to meet the requirements of their donors, especially if documentation is a major part of the work that they are funded to do.
- ! Ensure that this activity focuses on how to monitor HIV/AIDS documentation and communication products, rather than overall HIV/AIDS programmes or IEC work.
- ! Help participants to keep their monitoring questions and steps as simple as possible. For example, help them to identify just the key things that they need to know, rather than the details of every process and result.

Example: Traditional and Modern Health Practitioners Together Against AIDS and Other Diseases (THETA), Uganda

THETA is a local NGO involved in the response to HIV/AIDS. At a skills-building workshop, they looked at how they could monitor and evaluate their specific documentation and communication product – a case study. They started by reviewing their aim, priority objective and audiences and writing them on the left-hand side of a piece of flipchart paper. They then identified some indicators to show if their product was working, and wrote them in the centre of the paper. Finally, they decided what steps to take to gather the information to measure those indicators.

Aim and priority objective

To promote collaboration among traditional healers, biomedical workers and communities to improve the quality of health care.

To improve the awareness of the work of traditional healers by documenting and communicating best practices on traditional medicine as complementary health care practice.

Priority audience:

- Biomedical workers.

Indicators

- The number of copies of the case study distributed to biomedical workers.
- The number of different ways in which the case study is used (e.g. in journals, conferences).
- Biomedical workers request more information after reading or listening to the case study.
- Biomedical workers are more open to referring people to traditional health care providers.

Steps to collect the information

- Counting how many case studies are distributed.
- Recording the different ways in which the case study is used.
- Holding focus group discussions among biomedical workers.
- Attaching evaluation forms to the case studies, and analysing the information that is sent back.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, such as how it is important for an NGO's/CBO's indicators to allow them to assess what is going wrong as well as what is going right so that they can improve their future work.

Finally, THETA wrote their decisions about monitoring and evaluating their product under the seventh column of their documentation and communication planning grid.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)

ACTIVITY SHORTCUT

Ask participants to identify two to three key indicators to measure the success of their documentation and communication plan, and two to three steps to gather the relevant information.



2.8. Aim: To finalise a documentation and communication plan

Introduction

When an NGO/CBO has finished developing a documentation and communication plan for a specific product, it needs to look at the plan as a whole and reflect on its strengths and weaknesses.

A final review can help an NGO/CBO both to identify individual steps to be changed and to look at the plan as a whole. It can help an NGO/CBO to assess key issues about its planning – such as if all of the steps support the aim and priority objectives.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about why it is important to look at the plan as a whole.
- 3** Divide the participants into their NGO/CBO groups and ask them to review their documentation and communication planning grids using the “Checklist” (such as the Handout – which can be photocopied – at the back of Section 2) – to identify their plan’s overall strengths and weaknesses (see Example).
- 4** Ask the groups to identify what they have learned from their review, and to make any necessary changes to their plans.
- 5** Bring everybody back together, and ask each group to present their plan. Encourage the participants to ask each other questions and to make comments.
- 6** Ask the groups to consider the feedback from the other participants and, if necessary, to make final adjustments to their plans.
- 7** Ask the groups to write a neat, final version of their planning grid. (Give them a clean copy of the planning grid in order to do so.)
- 8** Facilitate a group discussion about what has been learned from the activity, based on questions such as:



- ? Will each step help to achieve the aim of the plan?
- ? Is each step of the plan as simple as possible?
- ? What are the weakest parts of the plan? How can they be improved?

A participant at a workshop in the Philippines reviewing his documentation and communication plan.

Facilitators' notes

- ! Encourage participants to focus on whether each step of their plan is not only effective but also realistic. Encourage them to ask themselves: "Can we really do this?" If the answer is no, help them to make that step more realistic.
- ! Encourage participants to look at the logical flow between the steps of their plans. Ask them to discuss any problems with the plans and to make adjustments.

Example: Uganda Youth Anti-AIDS Association (UYAAS), Uganda

UYAAS is an advocacy NGO involved in HIV/AIDS youth work. At a skills-building workshop, they developed a draft plan for their documentation and communication product – a leaflet about what their organisation does. To finalise it, they started by reviewing their planning grid – to assess the strengths and weaknesses of the individual planning steps.

Following this, UYAAS used a checklist to review the strengths and weaknesses of their plan.

Step 1	Step 2	Step 3	Step 4	Step 5				Step 6	Step 7
				Step 5a	Step 5b	Step 5c	Step 5d		

Examples of questions on checklist	Yes	No	Comments
1 Does the plan support the NGO's/CBO's mission?	✓		—
2 Will the plan bring practical benefits to the NGO/CBO's HIV/AIDS work?	✓		—
3 Are the aims and objectives of the plan as clear and simple as possible?	✓		—
4 Is there a logical flow between the steps of the plan?		✓	It is not clear how the dissemination strategies link to the audiences.

UYAAS then adjusted their plan accordingly – for example, changing their dissemination strategies to make them more suitable to their audiences. UYAAS presented their plan to the rest of the participants at the workshop and received comments. They then made some more small changes – such as clarifying some of their monitoring questions. Finally, they wrote up a neat, final version of their planning grid.

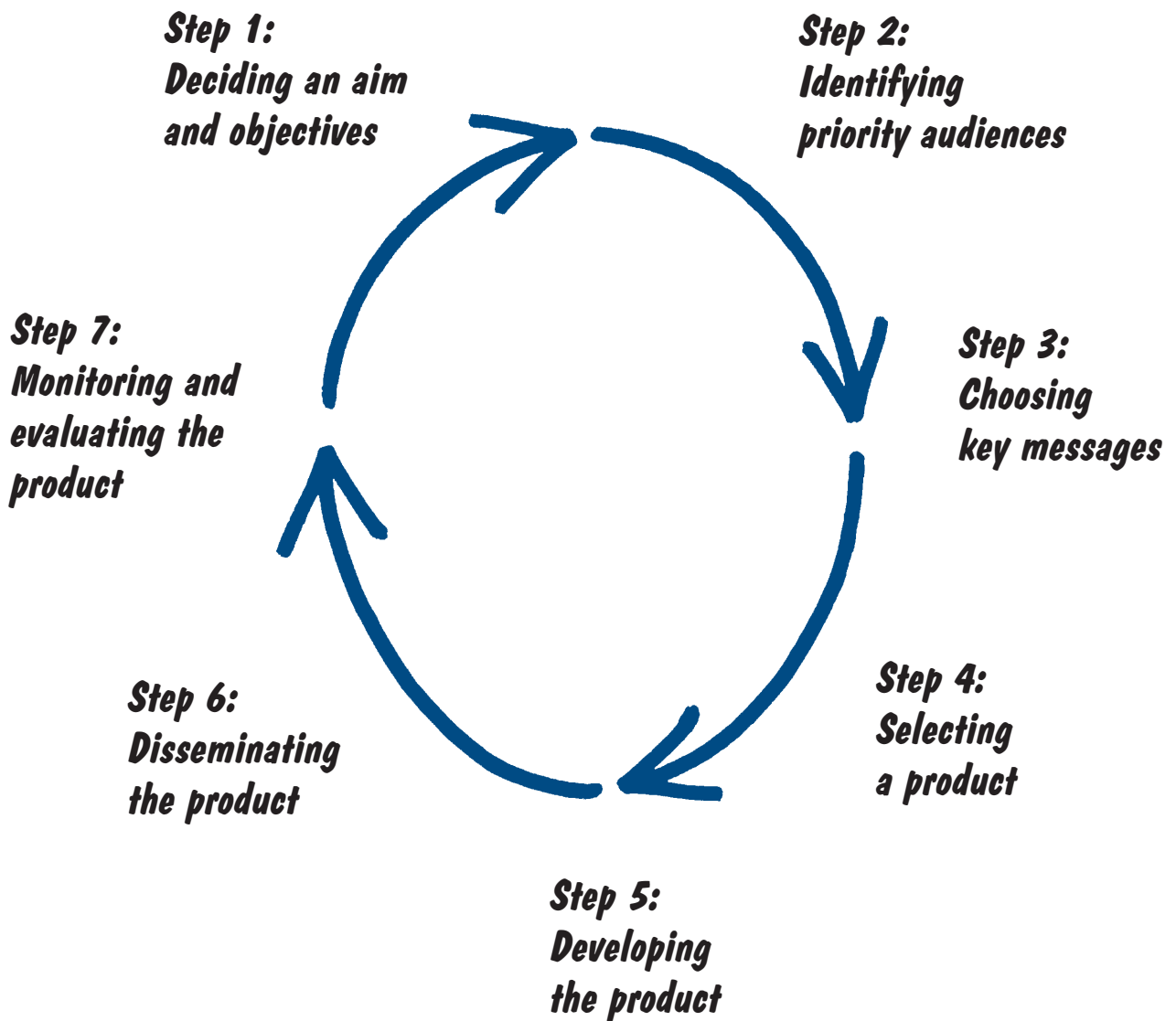
The facilitator then led a discussion about what had been learned from the activity, such as that a simple and strong plan is more effective than a complex one that won't be achieved.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Uganda Network of AIDS Service Organisations and the International HIV/AIDS Alliance, Uganda, March 2001.)



Ask participants to review their documentation and communication planning grids using a checklist. Ask them to produce a final, neat version.

Handout:
(Section 2) Making a planning framework and grid



Handout: (Section 2) Making a planning framework and grid

Step 1: Deciding an aim and objectives	Step 2: Identifying priority audiences	Step 3: Choosing key messages	Step 4: Choosing key messages	Step 5: Developing the product					Step 6: Disseminating the product	Step 7: Monitoring & evaluating the product
				5a: What structure, content and style will the product have?	5b: How will the product be prepared and produced?	5c: Who will do the work?	5d: When will the work be done?			

Handout: (Section 2.8) Finalising the plan

Checklist

Question	Yes	No	Comments
1: Does the plan support the NGO's/CBO's mission?			
2: Will the plan bring practical benefits to the NGO's/CBO's HIV/AIDS work?			
3: Are the aim and objectives of the plan as clear and simple as possible?			
4: Is there a logical flow between the steps of the plan?			
5: Is the plan realistic for the NGO's/CBO's resources?			
6: Can the plan be achieved within the timeframe?			
7: Does the plan complement the other activities that the NGO/CBO has planned?			
8: Is the language used in the plan clear and simple?			
9: Will the plan make sense to others?			
Other questions added by participants:			
10:			
11:			
12:			
13:			

Making an overall documentation and communication plan

Section 3

Contents

3.1	Making an overall documentation and communication plan	56
3.2	Integrating documentation and communication into an organisational plan	62
	Handout	64

Summary of Section 3

Section 3 helps participants to develop an overall plan for their documentation and communication work. It complements Section 2, which helps them develop a plan for a specific product.

Section 3 also supports participants to integrate documentation and communication work into their NGO's/CBO's organisational plan.

This section is important because it helps NGOs/CBOs to see the “bigger picture” of their documentation and communication work. This includes looking at their long-term vision for this area and how it fits with their NGO's/CBO's overall work. This helps to make sure that their documentation and communication efforts are not carried out in isolation, and have maximum benefit for their organisation and its HIV/AIDS work.

In practice, facilitators may wish to just introduce this section to participants during a workshop or training session, and then encourage them to complete it when they are back at their organisations.

(Note: This section requires **participants to work in the same groups, with colleagues from their own NGO/CBO, throughout all of the activities.**

This is because developing an overall documentation and communication plan and integrating it into an organisational plan is specific to each NGO/CBO.)



3.1. Aim: To make an overall plan for an NGO's/CBO's documentation and communication plan

Introduction

As well as plans for specific products, NGOs/CBOs often need to develop an overall plan for their documentation and communication work.

An overall plan helps NGOs/CBOs to think about the shape and direction of their documentation and communication work as a whole. This includes whether their ideas complement each other, and how much work it will involve in total.

An overall plan provides a written summary of a NGO's/CBO's work that can be shared within their organisation and with others.

Instructions

**Timing: 1 hour, 15 minutes
(minimum – see instruction 3)**

(Note: This activity presumes that participants have gone through Section 2 of this toolkit and have completed at least one detailed planning grid for a specific documentation and communication product.)

- 1** Explain the aim of the activity.
- 2** Divide the participants into the NGO/CBO groups so that they are working with colleagues from their own organisation. Ask them to review the objectives in their documentation and communication plans (see Section 2.1).
- 3** Then:
 - If they have completed planning grids for each of their documentation and communication objectives, go straight to Instruction 4.
 - If they have completed a planning grid for only one of their objectives, ask them to complete a grid for each of the others. This process should use the skills developed using Section 2, but does not necessarily need to involve such a detailed process. (Note: An additional 30 minutes will be needed for each grid.)
- 4** Ask the groups to summarise the key points from their planning grids as a one-page graphic showing their overall documentation and communication plan. This should include their aim, objectives, audiences/products, timing/dissemination, and monitoring indicators. (See Example and also the Handout – which can be copied on to an overhead transparency or photocopied for participants – at the back of Section 3.)
- 5** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 6** Lead a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is an overall documentation and communication plan needed as well as plans for specific products?
 - ? Why do the objectives in an overall plan need to complement each other?
 - ? Why should an overall plan be easy for an external audience to understand?

Facilitators' notes

- ! Explain to participants why it is important to go through the detailed process in Section 2 at least once before developing an overall documentation and communication plan. The reasons include that it helps them to develop practical skills and to thoroughly understand the issues involved.
- ! If participants are completing additional planning grids, encourage them to:
 - Reflect back on what skills and lessons they learned from developing the previous detailed plan before completing additional grids.
 - Where necessary, use some of the activities in Section 2 to clarify parts of their plans that need more thought.
- ! Help participants to pay attention to the logical flow of their overall plans – so that all the steps make sense as a whole.
- ! Support participants to keep the information about their overall plan as simple as possible and to fit on to one page.

Example: AIDS Action

AIDS Action is a fictitious local NGO involved in HIV prevention with sex workers. At a training workshop, they started by reviewing a planning grid that they had developed for one of their documentation and communication objectives. They did this by following the detailed planning process outlined in Section 2. They then filled in a planning grid for their second documentation objective. They did this by using the skills that they had developed from the detailed process, but this time simply filling in the columns.

AIDS Action then summarised their two grids as a one-page overall documentation and communication plan – to provide an easy-to-read outline of their work (see following pages). They added a brief introduction to their plan and attached the page to the planning grids for each objective. They produced several copies of this work – to share with colleagues and others, such as donors.

Afterwards, the facilitator led a discussion about what had been learned from the activity, such as that the objectives of an overall plan need to complement each other to ensure that documentation and communication work is as effective as possible.

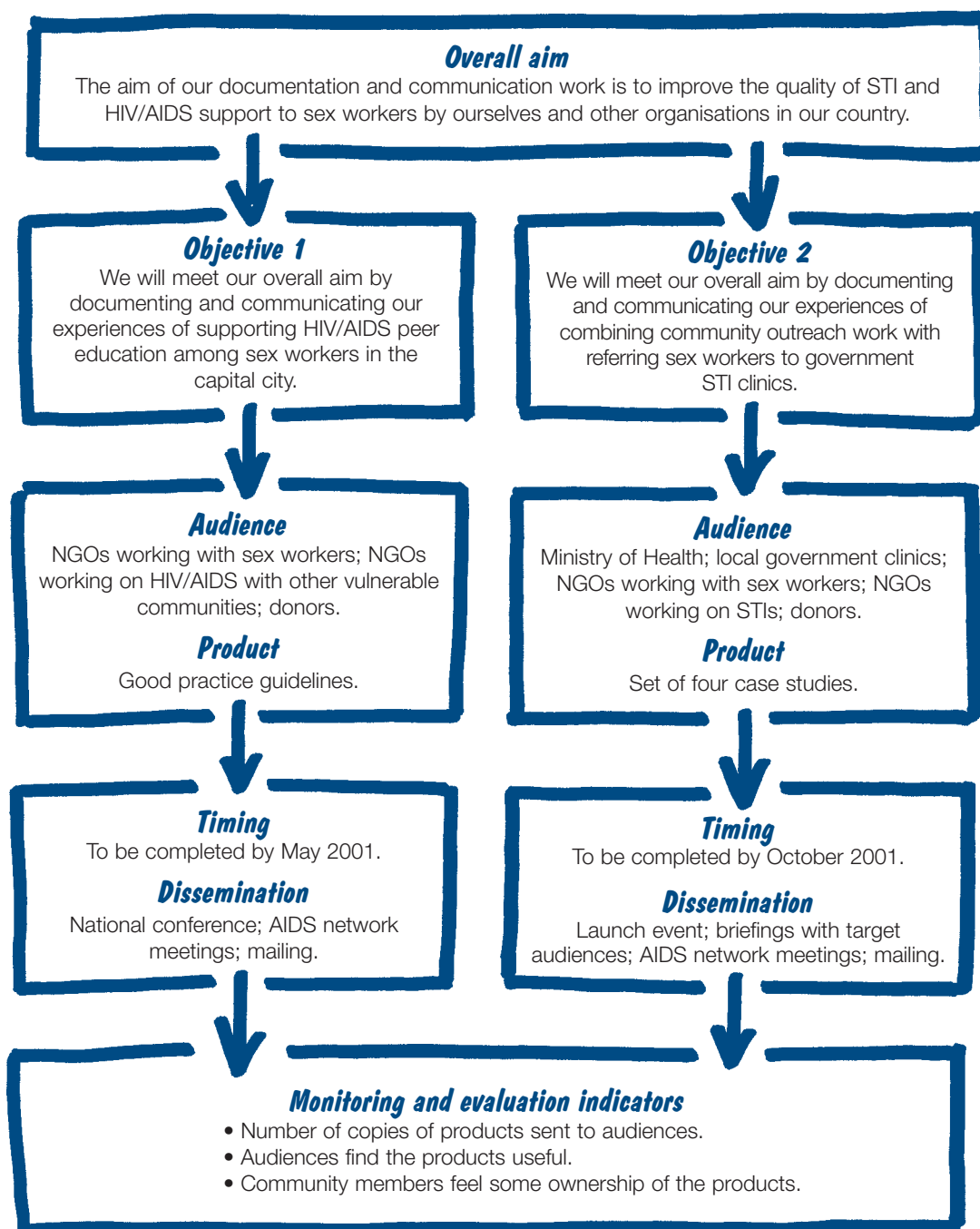
The following three pages show the results of their planning.

(Reference: Based on a compilation of plans developed during workshops in Zambia, the Philippines and Uganda, 2000 – 2001.)

Example: AIDS Action

Overall plan for documentation and communication work for 2001

AIDS Action is a fictitious local NGO that provides support – particularly in relation to STIs and HIV/AIDS – to sex workers in the capital city. The following provides a summary of their documentation and communication plan for the year 2001. Detailed plans for each objective can be found on the following pages.



(Reference: Based on a compilation of plans developed during workshops in Zambia, the Philippines and Uganda, 2000 – 2001.)

Example: AIDS Action

Objective 1: Planning grid

Step 1: Deciding an aim and objectives	Step 2: Identifying priority audiences	Step 3: Choosing key messages	Step 4: Selecting a product	Step 5: Developing the product			Step 6: Disseminating the product	Step 7: Monitoring & evaluating the product	
				5a: What structure, content and style will the product have?	5b: How will the product be prepared and produced?	5c: Who will do the work?			5d: When will the work be done?
<p>Aim: The aim of our documentation and communication work is to improve the quality of support to sex workers – particularly in relation to STIs and HIV/AIDS – by ourselves and other organisations in our country.</p> <p>Objective 1: To improve the quality of peer support to sex workers by documenting and communicating our experiences of HIV/AIDS peer education among sex workers in the capital city.</p> <p>Objective 2: To improve the quality of STI services for sex workers by documenting and communicating our experiences of combining community outreach work with referring sex workers to government STI clinics.</p>	<p>NGOs working with sex workers; NGOs working on HIV/AIDS with other vulnerable communities; donors.</p>	<p>1. Sex workers make excellent peer educators – because they understand each other so well.</p> <p>2. Participation is key to the successful training of peer educators among sex workers.</p> <p>3. Training of peer educators must be ongoing, with moral and technical support provided to sex workers on a long-term basis.</p>	<p>Good practice guidelines; 100 copies.</p>	<p>Structure: Title page; List of abbreviations; Contents page; Introduction; Section 1: Starting a peer education project; Section 2: Managing a peer education project; Section 3: Sustaining a peer education project; Conclusions and recommendations</p> <p>Style: Simple, but smart; colour cover; black and white contents; photographs; diagrams and graphics; in local language; informal, but authoritative.</p>	<p>1. Meeting of staff to decide a budget, outline and the key messages.</p> <p>2. Review of existing reports and materials.</p> <p>3. Meeting with peer educators to learn from their perspectives.</p> <p>4. Writing first draft of guidelines.</p> <p>5. Field-testing of draft guidelines with new group of peer educators.</p> <p>6. Production of final draft of guidelines.</p> <p>7. Review of final draft of guidelines.</p> <p>8. Publication of guidelines.</p>	<p>Programme co-ordinator; finance officer; director</p> <p>Programme co-ordinator; project assistant</p> <p>Programme co-ordinator; project officers</p> <p>Programme co-ordinator</p> <p>Project officers; project assistant</p> <p>Programme co-ordinator</p> <p>Programme co-ordinator; director; trustees.</p> <p>Programme co-ordinator; project assistant.</p>	<p>January 2001</p> <p>January 2001</p> <p>January 2001</p> <p>February 2001</p> <p>March 2001</p> <p>April 2001</p> <p>April 2001</p> <p>May 2001</p>	<p>National conference; AIDS network meetings; mailing.</p>	<p>Indicators:</p> <ul style="list-style-type: none"> Number of copies of guidelines sent to priority audiences. Audiences find the guidelines useful. Sex workers feel some ownership of the guidelines. <p>Steps to collect the information:</p> <ul style="list-style-type: none"> Count how many copies are sent to each priority audience. Keep a record of any feedback received from the priority audiences. Hold regular update meetings with the sex workers to get their feedback.

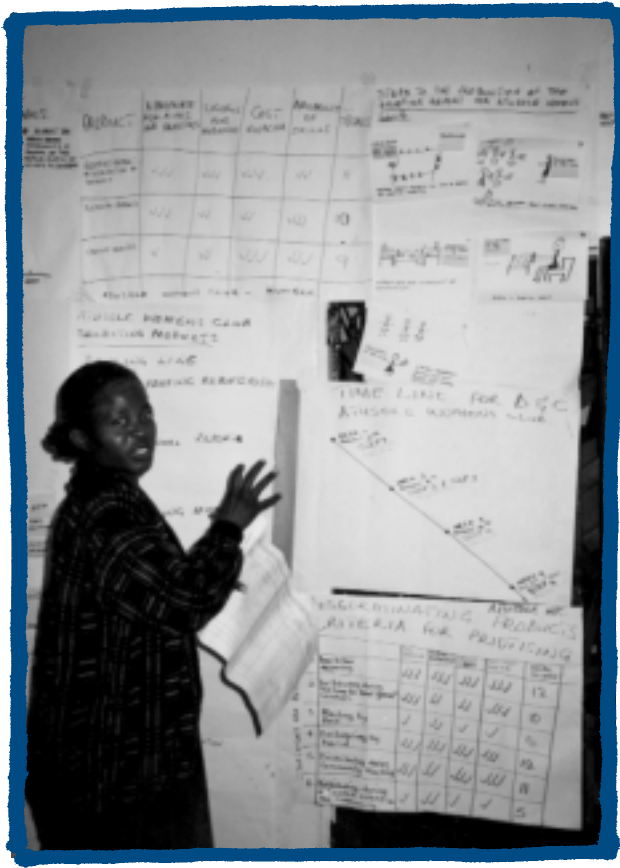
(Reference: Based on a compilation of plans developed during workshops in Zambia, the Philippines and Uganda, 2000 – 2001.)

Example: AIDS Action

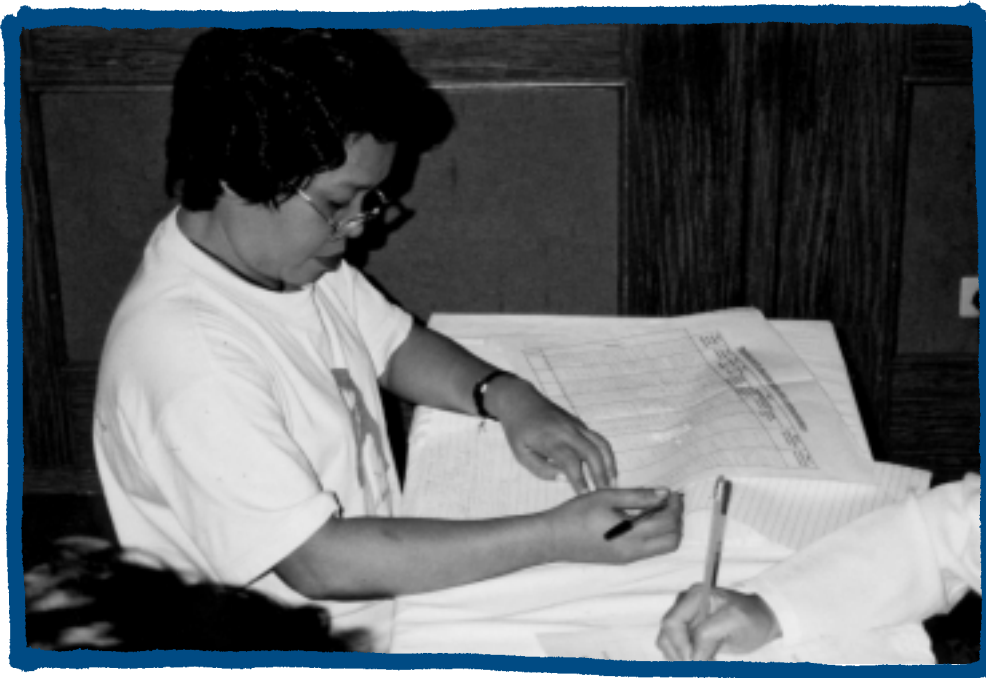
Objective 2: Planning grid

Step 1: Deciding an aim and objectives	Step 2: Identifying priority audiences	Step 3: Choosing key messages	Step 4: Selecting a product	Step 5: Developing the product			Step 6: Disseminating the product	Step 7: Monitoring & evaluating the product
				5a: What structure, content and style will the product have?	5b: How will the product be prepared and produced?	5c: Who will do the work?		
<p>Aim: The aim of our documentation and communication work is to improve the quality of support to sex workers – particularly in relation to STIs and HIV/AIDS – by ourselves and other organisations in our country.</p> <p>Objective 1: To improve the quality of peer support to sex workers by documenting and communicating our experiences of HIV/AIDS peer education among sex workers in the capital city.</p> <p>Objective 2: To improve the quality of STI services for sex workers by documenting and communicating our experiences of combining community outreach work with referring sex workers to government STI clinics.</p>	<p>Ministry of Health; local government clinics; NGOs working with sex workers; NGOs working on STIs; donors.</p>	<p>1. NGOs cannot and should not try to do everything. It is often better to have referral systems with existing services.</p> <p>2. Sex workers, NGOs and government clinics need to work in partnership for services to be effective and appropriate.</p> <p>3. Referral systems need to be based on official, mutually agreed procedures rather than just good will.</p>	<p>Set of four case studies; 150 copies.</p>	<p>Structure: Title page; List of abbreviations; Contents page; Introduction; Case Study 1; Case Study 2; Case Study 3; Case Study 4; Summary of lessons learned; Conclusions and recommendations</p> <p>Style: Simple, but smart; colour cover; black and white contents; photographs, diagrams and graphics; in English language; authoritative.</p>	<p>1. Meeting of staff to decide a budget; choose key messages and select the case studies.</p> <p>2. Review of existing reports and materials.</p> <p>3. Collection of information for case studies – including interviews with sex workers.</p> <p>4. Writing and designing of first draft of case studies.</p> <p>5. Checking of case studies with staff and community members.</p> <p>6. Review of final draft of case studies.</p> <p>7. Final design and publication of case studies.</p>	<p>Programme co-ordinator; finance officer; director</p> <p>Programme co-ordinator; project assistant</p> <p>Programme co-ordinator; project officers</p> <p>Project officers; project assistant</p> <p>Project officers; programme co-ordinator; project assistant</p> <p>Programme co-ordinator; trustees</p> <p>Programme co-ordinator; project assistant</p>	<p>June 2001</p> <p>June 2001</p> <p>July 2001</p> <p>August 2001</p> <p>September 2001</p> <p>September 2001</p> <p>October 2001</p>	<p>Indicators:</p> <ul style="list-style-type: none"> Number of case studies distributed to priority audiences. Audiences find the case studies useful. Sex workers feel some ownership of the case studies. <p>Steps to collect the information:</p> <ul style="list-style-type: none"> Count how many case studies are sent to each priority audience. Keep a record of any feedback received from the priority audiences. Hold regular update meetings with the sex workers to get their feedback.

(Reference: Based on a compilation of plans developed during workshops in Zambia, the Philippines and Uganda, 2000 – 2001.)



A participant in Zambia explaining how the results of their workshop activities were summarised in the planning grid she is holding. She then explained how they used their planning grids to develop their overall documentation and communication plan.



A participant using a planning grid to develop an overall documentation and communication plan during a workshop held in the Philippines.



3.2. Aim: To integrate a documentation and communication plan into an NGO's/CBO's organisational plan

Introduction

A final and vital step in planning documentation and communication work is ensuring that it is integrated into an NGO's/CBO's organisational plan.

Integration helps to ensure that documentation and communication work complements an NGO's/CBO's other efforts, and is accepted as an important part of the organisation's overall work.

The process of integration involves working with colleagues to ensure that the documentation and communication plan is as appropriate as possible, and will help to meet the NGO's/CBO's mission. It also includes making sure that the work is included in the NGO's/CBO's overall monitoring and evaluation plan.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Divide the participants into their NGO/CBO groups. Ask them to brainstorm how they will share their documentation and communication plan with the colleagues in their NGO/CBO. In particular, ask them to consider three questions:
 - ? Do you need to repeat the detailed planning process with your colleagues?
 - ? How can you encourage your colleagues to have ownership of the plan?
 - ? What problems might arise during this process? How can you solve them?
- 3** Ask the groups to brainstorm how they will integrate their documentation and communication plan into their NGO's/CBO's organisational plan. In particular, ask them to consider these three questions:
 - ? How can you ensure that documentation and communication work is integrated into your NGO's/CBO's organisational plan, including its monitoring and evaluation plan?
 - ? At what level should documentation and communication appear in your organisational plan? For example, should it be an objective or an activity?
 - ? When should this integration happen? For example, can you do it now, or can it wait until the next planning cycle?
- 4** Bring everybody back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 5** Lead a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is it important for all colleagues in an NGO/CBO to be committed to a documentation and communication plan?
 - ? Why does documentation and communication work need to be integrated into an organisation's plan, rather than being separate?
 - ? Why is it important to integrate documentation and communication into an organisation's overall monitoring and evaluation plan?

Facilitators' notes

- ! Support participants to think of creative ways to encourage ownership of their documentation and communication plan among colleagues. These might include a presentation at a staff meeting or a participatory planning session.
- ! Encourage participants to truly integrate their documentation and communication work into their organisational plan, rather than simply add it on to it.
- ! Encourage participants to think of the easiest way to integrate their documentation and communication work – so that the process does not become too lengthy or complex.

Example: AIDS Action

AIDS Action is a fictitious local NGO involved in responding to HIV/AIDS. Following a training workshop, during which they developed a documentation and communication plan, some members returned to their NGO. They then brainstormed how they would share their plan with their colleagues in the NGO. In particular, they responded to three questions:

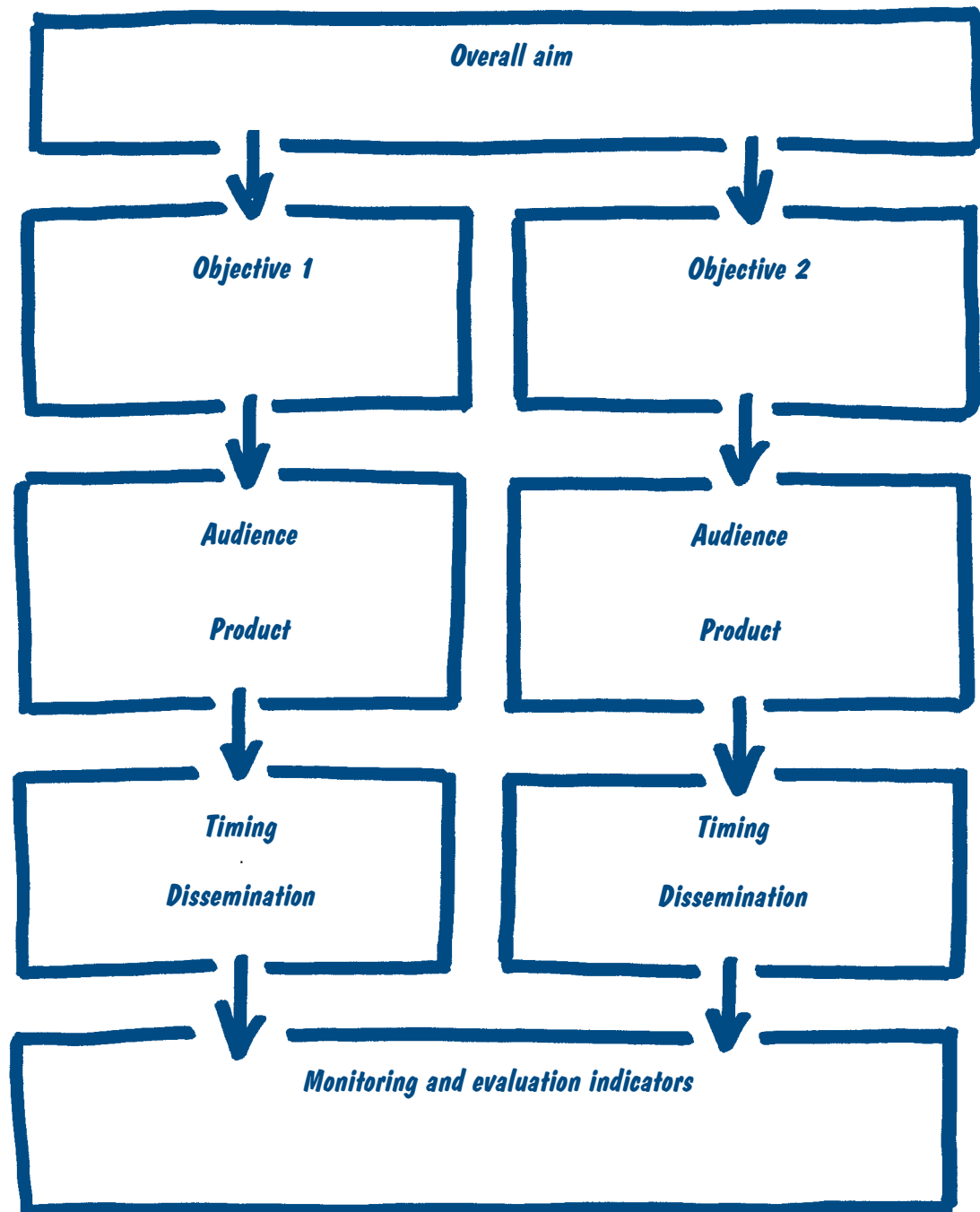
Question	Answer
1 Do you need to repeat the detailed planning process with your colleagues?	Yes, we need to repeat the key steps with the programme director and finance officer – to get their input and support.
2 How can you encourage your colleagues to have ownership of the plan?	We will present the plan at the next staff meeting and ask for their comments and ideas.
3 What problems might arise during this process? How can you solve them?	Some colleagues may think that our plan is unrealistic – so we will share with them the process that we went through to develop it.

AIDS Action then brainstormed how they would integrate their documentation and communication plan into their organisational plans. In particular, they responded to three questions:

Question	Answer
1 How can you ensure that documentation and communication work is integrated into your NGO's/CBO's organisational plan, including its monitoring and evaluation plan?	We will add documentation and communication to the guidelines that we use to develop our organisation's strategic plan and workplan.
2 At what level should documentation and communication appear in your organisational plan? For example, should it be an objective or an activity?	We will make it one of our organisation's four main objectives.
3 When should this integration happen? For example, can you do it now, or can it wait until the next planning cycle?	We will carry out the integration in December when we do our strategic planning for next year.

(Reference: Based on a compilation of experiences at workshops in Zambia, the Philippines and Uganda, 2000 – 2001.)

Handout: (Section 3.1) Making an overall documentation and communication plan



Building documentation and communication skills

Section 4

Contents

4.1	A: Identifying strengths, weaknesses and gaps	66
	B: Identifying lessons learned	68
4.2	Preparing an effective interview	70
4.3	Taking good notes	72
4.4	Choosing how to present information	74
4.5	Linking text and visuals	76
4.6	Keeping information short	78
4.7	Using simple language	80
4.8	Using appropriate and accurate language	82
4.9	Taking good photographs	84
4.10	Using photographs well	86
4.11	Making good visual aids	88
4.12	Delivering effective presentations	90
	Handouts	92 – 116

Summary of Section 4

Section 4 helps participants to build practical skills to carry out and improve their documentation and communication work.

It includes activities to help NGOs/CBOs to improve the quality of the information that they gather for their documentation and communication products. This includes support in identifying the strengths, weaknesses and gaps of their chosen subject matter, and the relevant lessons learned. It also includes support in carrying out effective interviews and taking good notes.

Section 4 pays particular attention to how to improve the quality of text and visual materials, as well as the links between the two. This includes support in choosing how to present information, keeping texts short, using simple, appropriate and accurate language, and taking and using good photographs. It also includes activities to help develop effective visual aids and deliver presentations.

This section is important because it helps NGOs/CBOs not only to carry out documentation and communication work, but also to ensure that their efforts are as creative and strong as possible. The activities can be used to support participants who are planning a specific product or those who want to improve selected aspects of their work in this area. All of the activities are accompanied by Handouts at the back of the section. The Handouts are a combination of technical information to support the facilitator (i.e. Useful ideas) and resources needed to carry out the activity.

4.1A. Aim: To build skills in identifying strengths, weaknesses and gaps about an area of work – as the first step in identifying lessons learned

Introduction

One of the key reasons for NGOs/CBOs to carry out documentation and communication work is to share practical lessons learned about their organisation and HIV/AIDS work. One way to do this is to start by identifying strengths, weaknesses and gaps in relation to a chosen subject.

Strengths mean:

- What the NGO/CBO has done well.
- What the NGO/CBO needs to keep doing or to do more of.

Weaknesses mean:

- What the NGO/CBO has not done well.
- What the NGO/CBO should do better, less of or differently.

Gaps mean:

- What the NGO/CBO has not done at all.
- What the NGO/CBO could also be doing.

Instructions

Timing: 1 hour

- 1 Explain the aim of the activity.
- 2 Facilitate a brainstorm about what is meant by each of the terms strengths, weaknesses and gaps (for example using the Handout at the back of Section 4). Discuss why it is useful to focus them as part of the process of identifying lessons learned to include in documentation and communication products.
- 3 Divide the participants into small groups of people who either work with the same NGO/CBO or who have a common focus of work. For example, there may be a group who have all carried out HIV prevention with young people or who have all been involved in care and support for people living with HIV/AIDS.
- 4 Ask the groups to identify the strengths of their work in a chosen subject, and then the weaknesses and gaps. Ask them to summarise the key points of each on three separate pieces of flipchart paper (see Example).
- 5 Bring everyone back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 6 Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Is it equally easy to identify strengths, weaknesses and gaps? Why?
 - ? What is the balance between strengths and weaknesses? What does this show?
 - ? What are the reasons for the gaps? For example, are they due to a lack of resources or the weak design of projects?

Facilitators' notes

- ! Ensure that the participants are clear about the meaning of the key terms – especially the difference between weaknesses and gaps – before they start their discussions.
- ! Support participants to be honest in their discussions – especially about weaknesses and gaps. Remind them that this is an internal process to help them to learn from their work and to identify lessons that might then be shared externally.
- ! Encourage participants to write their strengths, weaknesses and gaps in the form of complete sentences rather than just bullet points. This will help them to think about exactly what they want to say and to record their decisions effectively.

Example: Local NGOs/CBOs, Zambia

At a workshop to share experiences about HIV/AIDS community care and support, local NGOs/CBOs decided that they wanted to draw out their lessons learned about linking HIV/AIDS prevention and care. They started this process by identifying the strengths, weaknesses and gaps of their relevant work, and then summarising them in brief sentences on separate pieces of flipchart paper.

Strengths

- We have created an enabling environment that is helping the acceptance of people living with HIV/AIDS.
- We have used resources well – for example by integrating prevention into home care visits.

Weaknesses

- We have had inadequate involvement of care providers in prevention work.
- We have had a competitive relationship among care and prevention NGOs/CBOs – leading to a lack of collaboration.

Gaps

- We have not involved people living with HIV/AIDS in designing programmes to link prevention and care.
- We have lacked practical skills to make the real-life links between care and prevention.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example how gaps often occur because an NGO/CBO lacks resources and not because they lack ideas.

(Reference: Adapted from a workshop on "Community Care and Support", Zambia Integrated Health Programme and the International HIV/AIDS Alliance, Zambia, August 1999.)



4.1B. Aim: To build skills in identifying lessons learned about an NGO's/CBO's work

Introduction

Having identified the strengths, weaknesses and gaps in its work on a chosen subject, an NGO/CBO can go on to draw out its relevant lessons learned.

Lessons learned means:

- What has the NGO/CBO learned from its past work that could make its future work – and that of others – more effective?

Lessons learned need to be both positive and truthful. They are vital for NGOs/CBOs because they are based on their own real-life experiences.

Instructions

Timing: 1 hour

(Note: This activity follows on from Section 4.1A and presumes that participants are continuing to work in the same small groups.)

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what is meant by lessons learned (for example using the Handout at the back of Section 4). Then discuss why they are useful for documentation and communication about a chosen subject.
- 3** Ask the participants to work in their small groups and to start by reviewing the strengths, weaknesses and gaps that they identified about their chosen subject. Then, based on these, ask them to draw out the lessons learned.
- 4** Ask the groups to write their key lessons learned on a sheet of flipchart paper (see Example).
- 5** Ask the groups to arrange their four sheets of paper – with the strengths, weaknesses and gaps in a row at the top and the lessons learned underneath them.
- 6** Bring everyone back together, and ask the groups to present their results. Encourage the participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why was it important to identify strengths, weaknesses and gaps before lessons learned?
 - ? Is it clear how the strengths, weaknesses, gaps and lessons learned link together?
 - ? Are all of the lessons learned appropriate to share with external audiences? Why?

Facilitators' notes

- ! Ensure that participants are clear about what is meant by a lesson learned before they start this activity. Then, support them to identify lessons learned that are solidly based on the practical strengths, weaknesses and gaps that they identified – rather than on personal viewpoints.
- ! Encourage participants to write their lessons learned in the form of complete sentences rather than just bullet points. This will help them to think about exactly what they want to say and also to record their decisions effectively.
- ! Help participants to identify specific lessons learned that will be of concrete benefit to their work. For example, ask them to discuss the difference between these examples:
 - “Peer education is important for truck drivers.”
 - “Peer education is vital for working with truck drivers, particularly because they are a mobile population. Peer educators speak the same language and understand the lifestyle. They can give other truck drivers information and condoms on the spot, wherever and whenever they need them.”

Example: Local NGOs/CBOs, Zambia

At a workshop to share experiences about HIV/AIDS community care, NGOs/CBOs identified their strengths, weaknesses and gaps about linking prevention and care. They wrote their conclusions on three sheets of paper that they placed side by side. Based on these, they then drew out their lessons learned about the subject, and wrote them down on a fourth sheet of paper. They then placed that sheet of paper underneath the first three, with arrows showing the links between them.

Strengths

- We have created an enabling environment that is helping the acceptance of people living with HIV/AIDS.
- We have used resources well – for example by integrating prevention into home care visits.

Weaknesses

- We have had inadequate involvement of care providers in prevention work.
- We have had a competitive relationship among care and prevention NGOs/CBOs – leading to a lack of collaboration.

Gaps

- We have not involved people living with HIV/AIDS in designing programmes to link prevention and care.
- We have lacked practical skills to make the real life links between care and prevention.

Lessons learned

- If NGOs/CBOs do not involve all stakeholders – including people living with HIV/AIDS – it limits the quality of the planning and co-ordination of their efforts to link prevention and care.
- Although NGOs/CBOs are committed to the idea of linking prevention and care, they need capacity building – for example in setting up referral systems – to put it into practice.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about the importance of starting by identifying strengths, weaknesses and gaps so that lessons learned are based on an NGO's/CBO's practical experiences.

(Reference: Adapted from a workshop on “Community Care and Support”, Zambia Integrated Health Programme and the International HIV/AIDS Alliance, Zambia, August 1999.)



4.2. Aim: To build skills in preparing for effective interviews

Introduction

Interviews are one of the ways for NGOs/CBOs to gather information for a wide variety of documentation and communication products.

Interviews can be carried out with different types of people, including individuals and groups. They can also be carried out by different types of people, including NGO/CBO staff and volunteers.

Interviews need to be well prepared so that the information gathered is useful and the interview worthwhile for both the interviewer and the person being interviewed. They also need to be based on a combination of:

- Open-ended questions, to allow people to share their experiences, opinions and feelings. For example: “How do you feel about the project that you led?”
- Closed questions, to allow people to provide specific facts and details. For example: “How many staff were employed on the project?”

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what interviews are and why they are useful for documentation and communication work.
- 3** Facilitate a discussion about what is meant by open and closed questions, and why they are both important for gathering information.
- 4** Divide the participants into groups and provide each group with a copy of a case study (for example the L’AMMIE case study in the Handout at the back of Section 4).
- 5** Ask each group to develop questions that they could have used in an interview with an NGO/CBO to get the information for the case study. Ask them to include both open and closed questions.
- 6** Bring the groups back together and ask a few groups to share their questions. Encourage the participants to ask each other questions and to make comments. In particular, help them to identify any information in the case study that would be missing after all the questions had been asked.
- 7** Facilitate a brainstorm of “useful ideas” for preparing for effective interviews (for example using the Handout at the back of Section 4). Note the key points on a flipchart.
- 8** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is it important to prepare the questions for an interview in advance?
 - ? Why are both open and closed questions useful?
 - ? How can you balance getting the information you need with respecting someone’s privacy and confidentiality?

Facilitators' notes

- ! Ensure that participants are clear about what is meant by open and closed questions and feel confident about using both before they review the case study.
- ! Adapt this activity to whatever will be most relevant and useful for participants. For example, instead of focusing on a case study, they might want to prepare questions for a real interview that they want to carry out with a community member.
- ! Encourage participants to think about what “feel” interviews need, as well as what content. For example, ask them: How can you create a relaxed atmosphere for an interview? What type of body language should an interviewer communicate?

Example: Local NGOs/CBOs, Uganda

At a training workshop, local NGOs/CBOs in Uganda discussed why interviews are an important way to collect information for documentation and communication products. They then read a case study about L'AMMIE – an HIV/AIDS care and support group in Burkina Faso – and drafted questions that they would have needed to ask in an interview to get the information for the case study.

Examples:

Questions for L'AMMIE case study

- ? Could you briefly explain the history of your NGO?
- ? When and where was your organisation formed?
- ? Why was your organisation formed?
- ? What type of work does your organisation do?
- ? What organisations have supported you to do your work?

After sharing their questions, the participants then brainstormed some “useful ideas” for preparing for effective interviews:

Useful ideas for preparing for effective interviews

- ✓ Consider how confidentiality will be respected and discuss this with the interviewees.
- ✓ Prepare your questions in advance.
- ✓ Phrase your questions precisely.
- ✓ Use a mixture of open and closed questions.
- ✓ Ask one thing per question.
- ✓ Ask genuine questions and do not try to influence the answers.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how it is important to plan the questions for an interview in advance so that you gather the right type and amount of information.

(Reference: Adapted from a Workshop in “Documentation and Communication for HIV/AIDS Work”, Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



4.3. Aim: To build skills in taking notes

Introduction

Taking notes is an important way for NGOs/CBOs to record information to use in documentation and communication products.

Notes provide a written summary of an event that has taken place – varying from a conversation between two people to a large-scale meeting. They can be taken informally – for example, with a few key points being written by hand on a piece of paper. They can also be taken formally – for example, with all issues raised being typed up as “minutes”.

Notes need to be:

- Appropriate for how they will be used. For example, they might need to be brief and simple, or comprehensive and technical.
- Understandable to both the person who has written them and others.
- Kept in a place where they can be easily found.

Instructions

Timing: 1 hour, 15 minutes

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what notes are and why they are important for recording information for documentation and communication products.
- 3** Ask for three or four volunteers to carry out a role-play, for example of a discussion about women’s rights or of a weekly staff meeting. Ask them to go into another room and to prepare their role-play.
- 4** Divide the remaining participants into two groups and:
 - Ask the first group to prepare to take brief notes of the meeting.
 - Ask the second group to prepare to take detailed notes of the meeting.
- 5** Ask the volunteers to return to the room and to carry out their role-play. Ask the two groups to take notes of the meeting being acted out (see Example).
- 6** After the role-play, give the two groups 15 – 20 minutes to prepare their notes.
- 7** Bring the groups back together and ask a representative of each one to present their notes.
- 8** Facilitate a feedback session on taking notes of the role-play – including what went well and what could be improved in future. Encourage the participants to ask each other questions and to make comments. Write the key points on a flipchart and add any additional points that participants have not highlighted (for example from the Handout at the back of Section 4).
- 9** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What type of notes are suitable for what type of events?
 - ? How do you decide what to include and what not to include in notes?
 - ? What might happen if inadequate or inaccurate notes are taken?

Facilitators' notes

- ! Encourage the volunteers to create a realistic role-play that will raise interesting issues about note taking. For example, they might like to include:
 - Someone saying something that is confidential.
 - Someone saying something that contradicts something else that they said.
 - Two people arguing about an issue.
- ! Encourage participants to prepare their notes as well as they can in the 15 – 20 minutes that they are given. If they want to do further work on them, it may be appropriate to ask the groups to take them away to work on, and to return with final versions the next day.
- ! Encourage participants to focus on the general lessons about note taking that emerge from this activity, rather than on whether the notes taken of the role-play are 100 per cent accurate.

Example: Local NGOs/CBOs, Uganda

At a training workshop, local NGOs/CBOs involved in HIV/AIDS focused on building their skills in taking notes – as a way to gather information for their documentation and communication work. Some participants were asked to volunteer and to leave the room to prepare a role-play of a discussion about women's rights. Meanwhile, the other participants were divided into two groups. The first group was asked to prepare to take brief notes of the information shared during the discussion. The second group was asked to prepare to take detailed notes. The volunteers then returned and carried out their role-play, with the two groups taking notes.

After the role-play, the groups were given time to prepare their notes before presenting them to the other participants. Then the facilitator led a discussion about what went well and what could be improved in the future. The facilitator wrote some key "dos" and "don'ts" about taking notes on a flipchart and added additional points that the participants had not highlighted.

<i>Dos</i>	<i>Don'ts</i>
<ul style="list-style-type: none"> ✓ Do agree beforehand what should and shouldn't be recorded to respect confidentiality. ✓ Do write down quotes. ✓ Do focus on the main points. ✓ Do use language that is similar to that used in the discussion. ✓ Do take notes in a consistent way. ✓ Do write legibly. ✓ Do be objective. ✓ Do break up the information, such as by organising it under key headings. 	<ul style="list-style-type: none"> ✗ Don't volunteer to take notes if you want to participate in the discussion. ✗ Don't add your own ideas. ✗ Don't focus on the detail and miss the key points. ✗ Don't be biased or draw your own conclusions. ✗ Don't exaggerate points that are raised. ✗ Don't get so involved in the discussion that you forget to write things down.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how notes should be written up as soon as possible, while the information is still fresh in people's minds.

(Reference: Adapted from Workshop on "Documentation and Communication for HIV/AIDS Work", Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



4.4. Aim: To build skills in choosing appropriate ways to present information

Introduction

There are many different ways to present information in documentation and communication work – including through drawings, bullet points, tables, graphs and diagrams. It is also important that NGOs/CBOs select visuals that suit their organisation, product and audience.

When deciding what type of visuals to develop, it is useful to consider both practical issues (such as what relevant skills your NGO/CBO has) and design issues (such as whether the end product will be easy to understand and have a strong impact).

Instructions

Timing: 1 hour

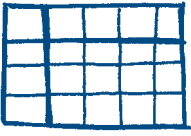





- 1** Explain the aim of the activity.
- 2** Facilitate a brainstorm with all the participants of the different ways that information can be presented visually. Examples might include “text”, “photos”, “diagrams”, and “bullet points” as well as many others. Write (or draw) this list down the left-hand side of a piece of flipchart paper.
- 3** Ask the participants to take each visual in turn and describe one to four different kinds of information that each can present the most effectively.
- 4** Facilitate a discussion about what other factors might be considered before selecting which visual to use when presenting information (for examples refer to the Handout at the back of Section 4).
- 5** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why are visual ways of presenting information important for documentation and communication work?
 - ? Can any kind of visual be used to present any kind of information? Why?
 - ? Can a combination of visual images be used in one documentation and communication product? Why?

Facilitators' notes

- !** Encourage participants to think broadly and to consider all types of visuals, even if they do not have experience of using them.
- !** Support participants to understand the arguments for and against different visuals – for example, in terms of how some can make information easier to understand, while others can distract the audience.

Example: Local NGOs/CBOs, Uganda.

At a skills-building workshop held in Uganda, local NGOs/CBOs brainstormed different ways to present information visually in documentation and communication products. They then considered what kind of information each of the visuals could best present.

Visual	Information each visual can present
<p>Tables</p> 	<ul style="list-style-type: none"> • Summarise data for easy reference • Document number data without having to repeat what each number means in text • Compare number data in a matrix and total a score • Store information other than numbers for comparison across rows and columns
<p>Bullet points</p> 	<ul style="list-style-type: none"> • Highlight key points clearly • Shorten text to key points • Clearly list things
<p>Graphs/charts</p> 	<ul style="list-style-type: none"> • To present data clearly • To show trends in data over time • Make comparisons between different data
<p>Photographs</p> 	<ul style="list-style-type: none"> • Show that the information is “real” and not just a theory • Show the feelings of the people to generate empathy and understanding in the reader • To show what a situation really looks like for people to make to their own assessments
<p>Drawings/ cartoons</p> 	<ul style="list-style-type: none"> • Explain complex situations • Illustrate information with humour • Illustrate a situation which cannot be photographed
<p>Diagrams</p> 	<ul style="list-style-type: none"> • Logical flow or order of different pieces of information

Afterwards, the facilitator led a discussion about what other factors should be considered when selecting which visuals to use. Ideas included whether the visuals would reproduce well, how much space there was for a visual, and how appropriate different visuals are for their documentation and communication audiences.

The facilitator then led a group discussion about what had been learned from the activity, for example about how important it is to consider what visuals to use in a documentation and communication product so that information is presented effectively.

(Reference: Adapted from a workshop on “Documentation and Communication of HIV/AIDS Work”, Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



4.5. Aim: To build skills in linking text and visuals

Introduction

NGOs/CBOs often combine written text with visuals in their documentation and communication products, and need to ensure that there is a strong link between the two.

Developing any materials takes time and resources. When combining both text and visuals it is important to be sure that they:

- Are not meaningless on their own – as some readers will only look at the visuals and others will only read the text.
- Do not merely repeat each other – unless it is a complex message that needs to be reinforced.
- Combine to provide a strong overall message.

Instructions

Timing: 45 minutes

- 1 Explain the aim of the activity.
- 2 Hand out copies of the drawing used on the opposite page. (Note: A larger example that can also be photocopied can be found at the back of Section 4.) Ask participants to look at the drawing and decide what it means or is trying to show.
- 3 Hand out copies of the quotation used on the opposite page. (Note: A larger Handout that can also be photocopied can be found at the back of Section 4.) Ask participants to read it and decide what it means. Then ask them to reflect on whether they interpreted the meaning of the drawing correctly.
- 4 Ask the participants to discuss what the drawing and text are communicating together, and how each helps to reinforce the message for the reader.
- 5 Ask the groups to identify some “useful ideas” about how to strengthen the links between text and visuals. Note the key points on a flipchart (see Example). Encourage the participants to ask each other questions and to make comments.



- 6 Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What can visuals add to text? What does text add to visuals?
 - ? Is it ever appropriate for text and visual to have different messages?
 - ? Do visual and texts need to have similar styles? Why?

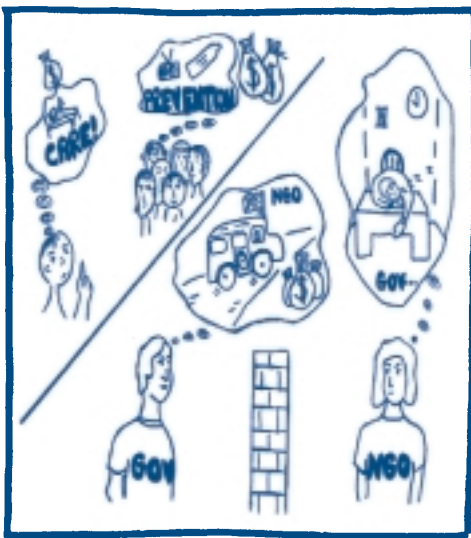
Participants at a workshop in the Philippines discussing how text and visuals can be linked.

Facilitators' notes

- ! Adapt this activity to the type of materials that suit the needs and interests of participants. For example, this could include looking at the links between:
 - The text and photographs of a case study.
 - The film of a video and the text of its accompanying booklet.
- ! Encourage participants to think about the style as well as the content of their visuals and text, and the extent to which they need to complement each other.

Example: Local NGOs/CBOs, the Philippines

At a training workshop for local NGOs/CBOs involved in HIV/AIDS, participants were given copies of a drawing used in Cambodia when presenting the challenges of starting up a joint Ministry of Health/NGO home care programme. They were asked to discuss what messages the drawing was trying to communicate. Participants were then given copies of a quotation from the report, and asked to discuss if their interpretation of the drawing was right. They were then asked to discuss what messages the drawing and text were communicating together.



"In getting the project off the ground we faced two major challenges. At such an early stage in the epidemic, care was not yet on the agenda, and it was difficult to find both the motivation and the funding for anything other than prevention. A second obstacle was the conceptual wall between government and NGOs/CBOs. The popular perception of NGOs/CBOs by government is of four-wheel drives and expensive programmes that do not conform to government policy. The reciprocal view of government is one of corrupt and poorly motivated staff. Nevertheless when the teams got out there and realised how well they collectively met the community's needs for appropriate care, the wall began to come down and the partnership has gone from strength to strength."

Based on their discussions, the participants then brainstormed some "useful ideas" about linking text and visuals. The facilitator wrote the key points on a flipchart and added additional points that the participants had not highlighted.

Useful ideas for linking text and visuals

- Make sure the messages of the text and visuals are the same.
- Make sure the tone and style of the text and visuals are the same.
- Make sure the text and visuals add to each other – rather than repeating exactly the same information.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how visuals can add life and "human interest" to text.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Philippines HIV/AIDS NGO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



4.6. Aim: To build skills in keeping information short

Introduction

Keeping information short and concise – otherwise known as “summarising” and “synthesising” – is a key skill for documentation and communication work.

A product that is concise is much more likely to be looked at, understood and acted on than one that is long and unfocused.

Many NGOs/CBOs find keeping information concise a challenge. But it is a skill that can be improved with practice and by thinking through some key questions, such as:

- What key messages do I want to communicate?
- What information is vital to include?
- What information is extra and could be left out?

Instructions

- 1** Explain the aim of the activity.
- 2** Lead a discussion about what is meant by keeping information concise – or “summarising” and “synthesising” – and why it is important for documentation and communication work.
- 3** Hand out copies of one or two pages of information (such as the sample Report Introduction at the back of Section 4).
- 4** Lead a discussion about how such a piece of text can be reduced in length. Write the ideas on a flipchart. Give out the Handout at the back of Section 4.
- 5** Divide the participants into groups and ask them to read the information, and to discuss what key messages it is trying to communicate.
- 6** Ask each group to reduce the pages of information to one paragraph.
- 7** Then ask each group to reduce the paragraph of information to one sentence.
- 8** Bring everybody back together and ask a few groups to share their work. Encourage the participants to ask each other questions and to make comments.
- 9** Lead a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is it important to thoroughly understand a text before starting to shorten it?
 - ? Does reducing the quantity of something reduce its quality?
 - ? Are there any disadvantages to making something as short as possible?

Facilitators' notes

- ! Encourage the participants to focus on the lessons from the activity, rather than whether their summaries of the information are 100 per cent accurate or complete.
- ! Encourage participants to write concisely by including only essential words and by writing in short sentences. This will help to ensure that their shortened versions do not lose the quality of the longer versions.

Example: Local NGOs/CBOs, the Philippines

At a training workshop, local NGOs/CBOs discussed how to keep information concise. They then read through the Introduction to a report and discussed its key messages.

This report shares the highlights and lessons learned from the second year of "Community Lessons, Global Learning" – a collaboration between the International HIV/AIDS Alliance and Positive Action, Glaxo Wellcome.

The Alliance is an international non-governmental organisation (NGO) that supports community action on HIV/AIDS in developing countries. To date, the Alliance has supported more than 1,100 community-based prevention and care initiatives in more than 13 countries in Africa, Asia and Latin America. Positive Action is Glaxo Wellcome's long-term international programme of HIV education, care and community support.

"Community Lessons, Global Learning" was launched in October 1997. The aims of the three-year project are:

- To help community groups to improve the quality of their HIV/AIDS work – by learning from the successes and failures of other organisations working in a similar context both within their own country and in other continents.
- To improve the quality of support to community groups by regional and international policy-makers and donors – by communicating community level experiences and needs.

Etc., etc.

The participants then summarised the key information from the Introduction in the form of a paragraph.

The report is by the International HIV/AIDS Alliance and Positive Action, Glaxo Wellcome, and is about the highlights and lessons learned from the second year of their three-year project called "Community Lessons, Global Learning". The theme of the second year was community care and support. There were three national and one regional workshops involving more than 182 participants from 15 countries. Participants exchanged practical experiences, successes and problems around the theme.

Finally, they summarised the key information from the paragraph in one sentence.

The report covers the International HIV/AIDS Alliance and Positive Action's highlights and lessons learned from their project "Community Lessons, Global Learning" to promote future action on community care and support.

Afterwards, the facilitator led a discussion about what had been learned from the activity, for example about how reducing the quantity of something can often increase its quality.

(Reference: Adapted from a workshop on "Documentation and Communication Skills for HIV/AIDS Work", Philippines HIV/AIDS NGO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



4.7. Aim: To build skills in using simple language

Introduction

Using simple language is an important part of effective documentation and communication work.

Simple language means that which is easy to understand and avoids complex terms.

Sometimes complicated language can seem “more official” or to be “more impressive”. However, the best kind of language allows people to communicate as clearly as possible. It is useful to remember that: *“What makes good, simple sense to you, will make good, simple sense to others”*.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Divide participants into small groups, and give each a copy of a complex letter (for example the Handout at the back of Section 4 which can be photocopied).
- 3** Ask the groups to read the letter and to discuss its content and language.
- 4** Ask the groups to identify some of the complex words used in the letter – such as “multi-sectoral”, “implementation”, “methodologies” and “sustainable” – and to translate them into simpler words or phrases (see Example).
- 5** Ask the groups to rewrite some of the letter – keeping the text about the same length, but using simpler and clearer wording.
- 6** Bring everybody back together and ask the groups to present their results. Encourage participants to ask each other questions and to make comments.
- 7** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? How might a donor react to the original letter? How might they react to the simpler version?
 - ? When is it OK to use complex words? When is it not OK? Why?

Facilitators' notes

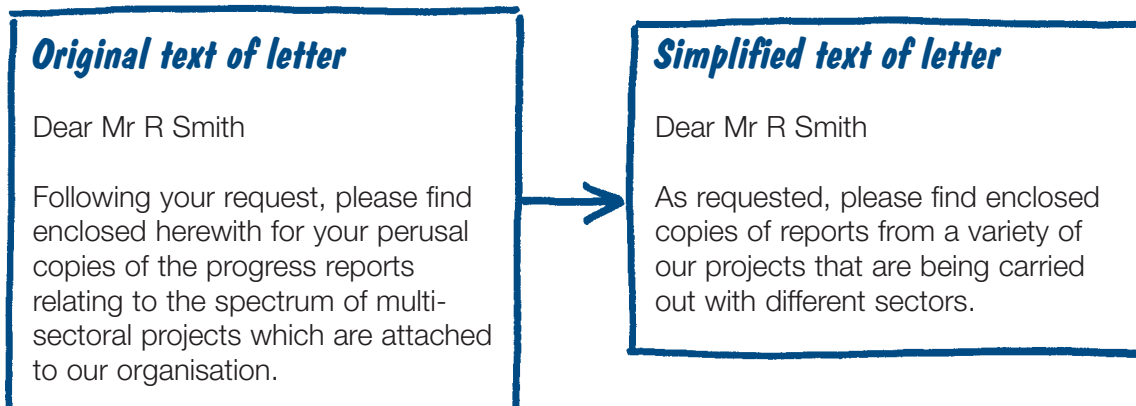
- ! This activity can be carried out in any language. However, it is most useful to use the official language of the country – so that participants practise how to simplify the language that they use with audiences such as donors or the government.
- ! Encourage participants to think of other complex words that they might use in their documentation and communication work, and to translate them into simpler words or phrases.
- ! If there is limited time for this activity, ask the participants just to rewrite the first sentence of the complex letter rather than the entire text.

Example: Local NGOs/CBOs, the Philippines

At a skills-building workshop, local NGOs/CBOs involved in HIV/AIDS reviewed a complex letter from an NGO/CBO to a donor. They started by identifying some of the most complicated words used and finding simpler ways to express them.

Complex word	Simpler translation
Multi-sectoral Implementation Methodologies Sustainable	Varied and different sectors Being done Ways Self-reliant

They then “translated” the complex letter and produced a simpler version. For example, the first line of the letter was improved as follows:



Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how it is only appropriate to use complex language if you understand it yourself and if your audience will appreciate it.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Philippines HIV/AIDS NGO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



4.8. Aim: To build skills in using appropriate and accurate language

Introduction

As well as using simple language for their documentation and communication work, NGOs/CBOs need to choose language that is appropriate and accurate.

Appropriate language means language that suits a particular context and is understood and appreciated by a particular audience. Accurate language means language that is correct.

Using appropriate and accurate language means avoiding words and phrases that are easily confused, imprecise or might have a negative effect.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Draw three large faces – one smiling, one neutral and one unhappy – on pieces of flipchart paper and place them on the wall in three different corners of the room.
- 3** Facilitate a discussion about what is meant by appropriate language.
- 4** Call out a word and an audience (for example, from the Handout at the back of Section 4). Ask the participants to run to the face that shows how they would feel about using the word in a documentation and communication product for that audience. For example, they should run to the smiling face if they think it suits the audience, to the unhappy face if they think it doesn't, and to the neutral face if they are not sure (see Example).
- 5** Ask the participants to explain how they decided upon which face to go to. Encourage them to ask each other questions and to make comments.
- 6** Repeat the activity using the same word and a different audience (for example, from the Handout at the back of Section 4).
- 7** Repeat the whole activity up to five times, using different words and pairs of audiences.
- 8** Facilitate a discussion about what is meant by accurate language.
- 9** Use the same methodology, but this time read out a sentence containing a word or phrase (for example, from the Handout at the back of Section 4) and ask participants to run to the face that shows how they feel about its accuracy.
- 10** Ask the participants to explain how they decided upon which face to go to. Encourage them to ask each other questions and to make comments. Support the group to decide whether the word or phrase is accurate or not.
- 11** Bring everybody back together, and clarify any words that participants did not fully understand (for example by using the definitions at the back of Section 4).
- 12** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What effect does inappropriate language have on an audience?
 - ? What effect does inaccurate language have on an audience?
 - ? Can a word be accurate, but not appropriate? Why?

Facilitators' notes

- ! This activity can be carried out in whatever language suits participants. It may be useful to use some words in the official language of the country and some in the local language. It may also be useful to include slang or "street language".
- ! Ensure that participants stand by a face that reflects how they as an NGO/CBO would feel about using the word in a documentation and communication product for the specific audience, not about how the audience would feel about reading or hearing the word.
- ! Encourage participants to describe why they are "happy", "not happy" or "not sure" about the appropriateness or accuracy of a word, and to listen to what others have to say. Make sure that the atmosphere is supportive enough for people to feel free to change their minds.

Example: Local NGOs/CBOs, Uganda

At a skills-building workshop, local NGOs/CBOs involved in HIV/AIDS carried out an activity about using appropriate and accurate language. They started by placing three large drawings of faces (one smiling, one frowning and one neutral) at different points in the room.

Then the facilitator called out a word and an audience – such as "penis" and "community elders". The participants ran to one of the faces according to whether the word would be appropriate to use in documentation and communication for that audience. For example, if they felt that it would be appropriate, they ran to the smiling face. The groups then explained why they were standing by which face. The activity was then repeated using the same word with a different audience – such as "community health workers" – and then for a further five words and five pairs of audiences.



The activity was then carried out again, this time focusing on the accuracy of the language. The facilitator read out the phrase "You should practise safe sex". Once more, the participants ran to one of the faces, but this time according to how accurate they felt the words to be for documentation and communication work. The groups then explained why they were standing by which face and discussed the issues in question. For example, the majority of people felt that "safer sex" would be a more accurate wording.

The whole activity was repeated several times with different phrases. Then, the group reviewed some of the words that they had used – to make sure that all of the participants knew their correct meaning.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how inappropriate or inaccurate language can lead to misinterpretations and be harmful to the image of an NGO/CBO.

(Reference: Adapted from Workshop on "Documentation and Communication for HIV/AIDS Work", Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



4.9. Aim: To build skills in taking good photographs

Introduction

Photography is one of the most commonly used and effective methods of visual documentation and communication.

Improving skills in taking good photographs does not need highly technical equipment or skills. Instead it involves good preparation and following a few basic “rules” or “useful ideas” about how to use a camera and how to choose an image.

Instructions

Timing: 45 minutes

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about how to take photographs. Ask the participants to share both their good and bad experiences.
- 3** Ask the participants to identify “useful ideas” for taking good photographs. Encourage them to ask each other questions and to make comments.
- 4** Ask a volunteer to write a summary of the key points on a flipchart (see Example).
- 5** Add any points that have not been raised (for example by using the Handout, which can be photocopied, at the back of Section 4).
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the two to three vital “dos and don'ts” for taking good photographs?
 - ? Is it always possible to take a good photograph while not being intrusive?
 - ? What issues are most important when taking appropriate photographs of HIV/AIDS work?

Facilitators' notes

- ! Keep the activity at a level that all participants can follow, even if there are experienced photographers in the group. Make sure that the “useful ideas” are relevant for people using the simplest of cameras.
- ! Help participants to think about how to remember the two or three key “dos and don'ts” even when taking photographs under stressful and hurried conditions.
- ! If you do not have time to carry out this activity in full, the Useful Ideas at the back of Section 4 can be copied and given to participants as a handout.

Example: Local NGOs/CBOs and District Health Management Teams (DHMTs), Zambia

At a skills-building workshop for NGOs/CBOs and DHMTs involved in HIV/AIDS, participants discussed their experiences of taking photographs of their HIV/AIDS projects. They then brainstormed a list of practical “useful ideas” about how to take good photographs.

Useful ideas for taking good photographs

- Read the instruction book and get to know your camera.
- Know how to load a film.
- Buy the right speed of film and the best you can afford. Don't expose it to water or light.
- When taking a photograph, stand with both feet on the ground and slightly apart.
- Take photos of activities that are relevant to your NGO's/CBO's aims and objectives.
- Make sure that the subject is in focus. Don't get too close (so that they are blurred) or too far away (so that they can't be seen).
- Be careful that the background of the object isn't too distracting.
- Make sure there is enough light.
- Don't use flash too close to the subject.
- Beware of shadows, especially across people's faces.
- Take photos of people in action.
- Make sure that you seek permission from the people who are in the photo.
- Beware of prohibited areas.
- Take natural rather than posed photos.
- Take both landscape and portrait photos – so that they can be used in different ways in your products.
- Beware of taking photos with very bright backgrounds – such as windows – as the subject will be very dark.

The facilitator then added other “useful ideas”, such as *“Take a few good photos rather than many bad ones”* and *“Take notes of what you have photographed, including details such as dates, names and places”*.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about the importance of respecting the confidentiality of people living with HIV/AIDS when taking photographs.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Zambia Integrated Health Program, Central Board of Health and the International HIV/AIDS Alliance, Zambia, July 2000.)



4.10. Aim: To build skills in using photographs well

Introduction

As well as taking good photographs, an NGO/CBO needs to think about how to use photographs well in its documentation and communication work.

To use a photograph well, an NGO/CBO can consider issues such as:

- Is the photograph relevant to the subject matter?
- Is the photograph appropriate for the audience?
- Does the photograph present the person/place/activity in an appropriate way?
- Does the photograph communicate the right message?

Instructions

Timing: 1 hour, 15 minutes

- 1** Explain the aim of the activity.
- 2** Divide participants into small groups and give them two examples of photographs of people living with HIV/AIDS (such as the examples in the Handout at the back of Section 4).
- 3** Ask the groups to look at each photograph and to discuss its strengths and weaknesses. Then ask them to answer a relevant question about each photograph (such as those accompanying the photographs in the Handout at the back of Section 4). (See Example.)
- 4** Repeat the activity using examples of other areas of HIV/AIDS work – such as projects and training workshops (see the further examples in the Handout at the back of Section 4).
- 5** Bring everyone back together, and ask the groups to share their results. Encourage the participants to ask each other questions and to make comments. Add any points that have not been raised (for example by using the Useful Ideas at the back of Section 4).
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? Why is the way photographs are used particularly important for documenting and communicating HIV/AIDS work?
 - ? Is it ever appropriate to use a negative image of a person or activity? Why?
 - ? What difference does the size and placing of a photograph make to its impact in a documentation and communication product?

Facilitators' notes

- ! Use examples of photographs by external organisations to avoid participants feeling defensive if their own work is criticised.
- ! Use a variety of images including some strong examples, to enable participants to give positive as well as negative feedback.
- ! When discussing photographs of people living with HIV/AIDS, encourage participants to think about issues around consent for their use as well as about what messages they should convey.
- ! Encourage participants to think about how the lessons learned from this activity might apply to using other visual materials – such as drawings, graphics and videos.

Example: Local NGOs/CBOs, the Philippines

At a training workshop, local NGOs/CBOs involved in HIV/AIDS looked at two photographs of people living with HIV/AIDS. They discussed the photographs' strengths and weaknesses, and answered a question about each one. For example, the analysis of the first photograph looked at:

What are the strengths of the photograph?

- The text on the backs of the T-shirts communicates a specific message.
- The layout is good.
- The image respects the confidentiality of the people living with HIV/AIDS.



What are the weaknesses of the photograph?

- The text on the T-shirts needs to be translated to be understood by people who don't speak French.
- The text and other parts of the image are blurred.
- The image is focused on words rather than action.
- It is unclear where the people are and what they are doing.

How could a photograph show people living with HIV/AIDS in a more active role?

- By showing them as part of a group or a community.
- By showing them doing something – such as leading a training session or providing counselling.
- By showing their faces (if their consent is given) to demonstrate that they are real, live human beings.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how it can sometimes be appropriate to include negative images, but that they should be used very carefully and only to convey specific types of messages.

(Reference: Adapted from a workshop "Documentation and Communication Skills for HIV/AIDS Work", Philippines HIV/AIDS NGO/CBO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)



4.11. Aim: To build skills in making good visual aids

Introduction

Visual aids – such as flipcharts and overhead transparencies – are an important part of documentation and communication work.

The quality of flipcharts and overhead transparencies can make a real difference to the effectiveness of NGOs'/CBOs' presentations and displays. As with other areas of documentation and communication, the most important rule is to keep the style and information as simple, appropriate and focused as possible.

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what makes good visual aids – such as flipcharts and overhead transparencies – for use in documentation and communication.
- 3** Ask the participants to identify “useful ideas” about making good visual aids. Write the key points on a flipchart – noting those that apply to all visual aids in one list, and those that apply to specific visual aids in others. Encourage the participants to ask each other questions and to make comments (see Example).
- 4** Add any additional points (for example from the Useful Ideas at the back of Section 4).
- 5** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the two or three essential “dos and don’ts” about developing effective visual aids?
 - ? How can you make a visual aid attractive, but not too distracting?
 - ? How can you make a visual aid authoritative, but not too technical?

Facilitators' notes

- ! Encourage participants to think through the “pros and cons” of visual aids that are made by hand and of those that are made using a computer. Encourage them to see that effective ones do not necessarily need to be expensive or highly technical.
- ! Encourage participants to try out their “useful ideas” in practice. For example, let them experiment with different sizes of text on transparencies or different colours of pens on flipcharts.
- ! Consider using examples of good and bad flipcharts and overhead transparencies for this activity but try not to point out bad examples from the work of the participants unless there is a very supportive atmosphere.

Example: Local NGOs/CBOs, Uganda

At a training workshop, local NGOs/CBOs involved in HIV/AIDS held a brainstorm about making good visual aids for their documentation and communication work. They summarised their ideas in three lists of “useful ideas” – one for all types of visual aids, and one for each of flipcharts and overhead transparencies.

Useful ideas for making good visual aids

- ✓ Make them clear – so that the information is not cluttered. Limit each line of text to six words or less – avoid blocks of text by only including the key points.
- ✓ Make sure the headings are clear – both visually and as a summary of what is being presented.
- ✓ Make them smart and clean – so that they present a good image.
- ✓ Use dark colours for texts – so that people can read them easily.
- ✓ Make them attractive, but do not include too many distracting colours or diagrams.
- ✓ Make sure that they complement – rather than contradict – what is being said by the person making the presentation.
- ✓ Write words or phrases rather than complete sentences.
- ✓ Make sure that the presentation does not include too many visual aids – so that people listen to what is said.

Useful ideas specific to flipcharts	Useful ideas specific to overhead transparencies
<ul style="list-style-type: none"> ✓ Use capital letters rather than lower case. ✓ Write letters at least 8cm high – so that they can be read from a distance. ✓ Tear or cut the sheets of flipchart neatly. ✓ Consider writing the flipchart so that it can be unfolded gradually to reveal each point in turn during the presentation. ✓ Store the flipcharts by rolling them up rather than folding them. 	<ul style="list-style-type: none"> ✓ Use a font size that is no smaller than 18 point. ✓ Leave a border between the text and the edge of the transparency. ✓ Use the correct pens for transparencies and make alterations with a clean, damp cloth. ✓ Store the transparencies carefully, and keep them away from heat and damp. ✓ Number the transparencies in case you drop them!

The facilitator then led a group discussion about what had been learned from the activity, for example about the importance of visual aids being interesting enough to be attractive, but not so interesting that they distract from the main messages of the presentation.

(Reference: Adapted from Workshop on “Documentation and Communication for HIV/AIDS Work”, Uganda Network of AIDS Service Organisations and International HIV/AIDS Alliance, Uganda, March 2001.)



4.12. Aim: To build skills in delivering effective presentations

Introduction

As well as preparing an interesting text and having good visual aids, an NGO/CBO needs strong presentation skills to communicate its work effectively.

Many people get nervous about making presentations. However, by following some basic “dos and don’ts”, people can build their skills and communicate with confidence and style.

(Note: Further support in this area can be found in “Information card 8: Presentation” and “Section 4.11: Making good visual aids”.)

Instructions

Timing: 1 hour

- 1** Explain the aim of the activity.
- 2** Facilitate a discussion about what presentations are and why they are useful for documentation and communication work. Ask participants to share their experiences of both making presentations and listening to them.
- 3** Present participants with a drawing of someone making a presentation (for example using the blank one – which can be photocopied or made in to an overhead transparency – in the Handout at the back of Section 4).
- 4** Ask participants to discuss the drawing and to identify the “dos and don’ts” of making presentations. Encourage them to ask each other questions and to make comments.
- 5** Write the key points on a flipchart. Add any additional points that participants have not covered (for example by using the graphic with boxes – which can be photocopied for participants – in the Handout at the back of Section 4). (See Example.)
- 6** Facilitate a group discussion about what has been learned from the activity, based on questions such as:
 - ? What are the two to three essential “dos and don’ts” of making presentations?
 - ? What practical steps can help someone to be less nervous about making a presentation?
 - ? How can you tell if your presentation is going well? What can you do if it is not?

Facilitators' notes

- ! Encourage participants to base their “dos and don'ts” on their experiences of being members of audiences for presentations. Encourage them to think about what made them interested or bored, and what encouraged them or put them off.
- ! Encourage participants to try out their “dos and don'ts” in practice. For example, ask them to carry out role-plays of making mini presentations to each other about their HIV/AIDS work or their organisations.

Example: Local NGOs/CBOs, the Philippines

At a skills-building workshop for local NGOs/CBOs involved in HIV/AIDS, participants shared their experiences of making and listening to presentations. The facilitator presented them with a drawing of someone making a presentation, and asked them to identify the key “dos and don'ts” of making effective presentations.

<i>Dos</i>	<i>Don'ts</i>
<ul style="list-style-type: none">✓ Do know who your audience will be.✓ Do prepare your presentation and practise it.✓ Do establish eye contact with different members of the audience.✓ Do use good visual aids that add something to what you are saying.✓ Do vary your tone – so that people do not get bored.✓ Do speak loudly and clearly.✓ Do dress appropriately.✓ Do be confident.✓ Do check the equipment – such as the overhead projector – before using it.✓ Do number your overheads – in case you drop them or get confused.✓ Do pause to allow people to consider key points.	<ul style="list-style-type: none">✗ Don't read your text word for word. Instead use it as a reminder of the points you want to make.✗ Don't move around too much and distract your audience.✗ Don't use information that is out of date.✗ Don't ignore questions that you cannot answer.✗ Don't use inappropriate language.✗ Don't “waffle”. Instead, stop when you have nothing more to say.✗ Don't tell jokes unless you are confident that they are appropriate and funny!

Then the facilitator added some additional “dos and don'ts” including “Do repeat a question if you think others in the audience may not have heard it” and “Don't block the view of your audience”.

Afterwards, the facilitator led a group discussion about what had been learned from the activity, for example about how preparing and practicing presentations in advance can help people to be less nervous about delivering them.

(Reference: Adapted from a workshop on “Documentation and Communication Skills for HIV/AIDS Work”, Philippines HIV/AIDS NGO Support Program and the International HIV/AIDS Alliance, the Philippines, September 2000.)

Handout: (Section 4.1A) Identifying strengths, weaknesses and gaps

Useful ideas

Ensure that strengths, weaknesses and gaps are:

- Based on an NGO's/CBO's real work rather than on impressions or personal opinions.
- Specific rather than general, for example talking about individual activities rather than overall programmes.
- Practical rather than theoretical, for example focusing on actual experiences rather than ideas.
- Agreed by the relevant people involved, including community members, staff and volunteers.
- Written as complete sentences, rather than individual words or bullet points.
- Worded simply and clearly – so that others can understand them too.
- Worded sensitively and diplomatically – so that, in particular, the weaknesses do not make people feel defensive.

Handout: (Section 4.1B) Identifying lessons learned

Useful ideas

Ensure that lessons learned are:

- Based on the strengths, weaknesses and gaps that an NGO/CBO has identified from their past experiences.
- As specific and practical as possible, for example identifying what did and did not work and making suggestions for future action.
- Agreed by the relevant people involved, including community members, staff and volunteers.
- Written as complete sentences, rather than individual words or bullet points.
- Worded simply and clearly – so that others can understand them too.
- Worded sensitively and diplomatically – so that they do not make people feel insecure or defensive.

Handout: (Section 4.2) Preparing an effective interview

Case study: AMMIE, Burkina Faso

Association pour l'Appui Moral, Matériel et Intellectuel à L'Enfant (AMMIE) was founded five years ago when health workers at the regional hospital in Ouahigouya, northwest Burkina Faso, grew frustrated by the growing number of preventable illnesses in the local community. AMMIE decided to work with 10 of the 14 sectors surrounding Ouahigouya to provide primary health care including basic health promotion. Each sector – which contains approximately 5,000 people – was invited to elect a male and female Community Agent (CA) to be trained, supported, and paid a small monthly amount to act as health visitors in villages.

In 1994, Initiative Privée et Communautaire (IPC) supported AMMIE to train their CAs to begin providing HIV/AIDS education as part of their visits. After that, they received further support to move into care and support work. It was decided that the CAs should be trained to provide basic home care, arrange referrals, facilitate transport to the doctor and/or local hospital when necessary, and provide immediate basic care. They now carry medical kits with basic supplies including soap, alcohol, cotton and gloves, as well as some essential drugs, including treatments for diarrhoea. The main problems they experience are the high cost of basic drugs, transport for the CAs, and poor HIV testing practices in the region.

“The volunteers at AMMIE were very eager to get involved with HIV care, because they encountered many people living with HIV/AIDS and felt inadequate when all they could do was provide information about how the virus is and isn't spread,” explained a spokesperson from IPC. “Adding HIV/AIDS care both helped to respond to an immediate need and increased the status and legitimacy of the health visitors.”

While AMMIE has successfully shifted into a care role, it has not yet maximised all of its opportunities for prevention work. For example, while CAs include some syndromic STD diagnosis and treatment among their services, they are not carrying and promoting condoms. These are priorities for future improvement.

(Reference: Adapted from “Beyond Awareness Raising: Community Lessons about improving responses to HIV/AIDS”, International HIV/AIDS Alliance, July 1998.)

Handout: (Section 4.2)

Preparing an effective interview

Useful ideas

- 1** Prepare a list of questions in advance, based on the information that you want to gather.
- 2** At the start, inform the person being interviewed of:
 - How long the interview will be.
 - What form the interview will take.
- 3** Ensure that the person knows how the information from the interview will be used and is comfortable about the level of confidentiality.
- 4** Ask one thing per question, and phrase all questions clearly and simply. Remember that an interview is an opportunity to gain information from someone else, not to show off your own knowledge!
- 5** Use a combination of:
 - Open questions – to allow people to share their experiences, thoughts and feelings.
 - Closed questions – to gather specific facts and details.
- 6** Start with a few general questions to put the person at their ease. Then move on to more detailed or difficult questions.
- 7** Prioritise your questions – so that you will definitely have enough time to ask the most important ones.
- 8** Mark questions that you can miss out if you start to run out of time.
- 9** Don't interrupt the interviewee if they are answering your question.
- 10** Keep your body language relaxed and friendly, but also look awake and interested!

Handout: (Section 4.3)

Taking good notes

Useful ideas

Before taking notes:

- Don't volunteer to take notes if you want to be part of the discussions.
- Think about the type of notes you need and how you will use them.
- Prepare yourself – by finding out how long you will need to take notes for and what kind of information should be recorded.
- Plan your strategy. For example, think of the pros and cons of taking notes by hand, typing them on to a computer or using a tape recorder.

While taking notes:

- Ensure that the notes accurately reflect what is being said and done.
- Use a clear format that will be easy for the reader to follow. For example, break the text up into the key points that need to be highlighted, and make sure that they come through clearly.
- Write down quotes and indicate whether they have been “written as spoken” using speech marks: “QUOTE”.
- Identify what information is not necessary for future reference and can be missed out.
- Write legibly and in a simple and consistent style.
- Avoid getting too emotionally involved in the proceedings. Also, try not to exaggerate, be biased or include your own opinions.
- Make sure the notes record when the information was gathered and who was there.

After taking notes:

- Write up notes as soon as possible, while the information is still fresh.
- Keep your notes in a place where others can access them.

Handout: (Section 4.4)

Choosing how to present information

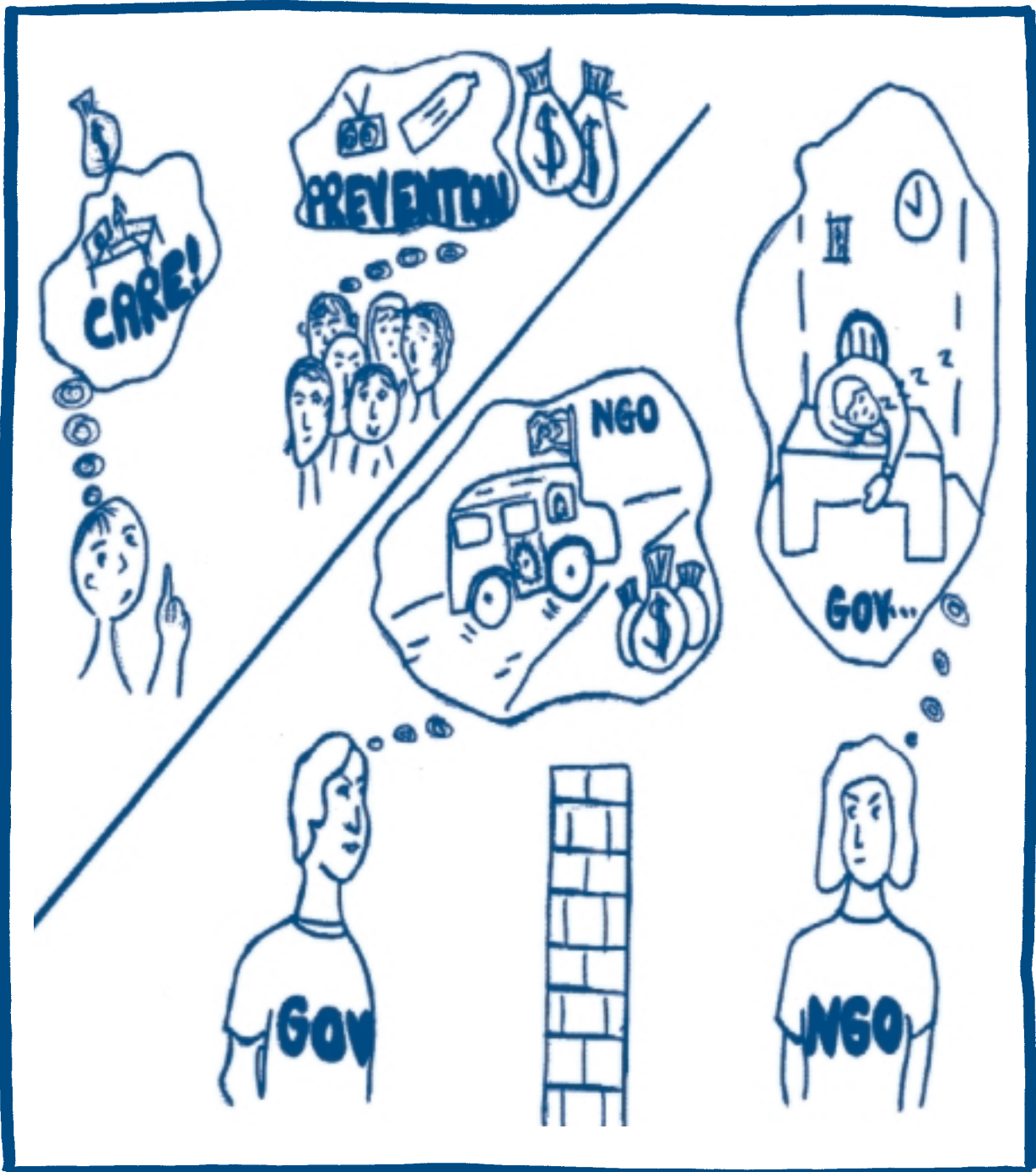
Useful ideas

Information needs to be presented in a way that is:

- Interesting, attractive and eye-catching.
- Appropriate for the amount of space available in the product for the information.
- Balanced in terms of amount of text, and number and different types of visuals.
- Appropriate for the way in which the product will be reproduced. For example photographs do not photocopy well but clear drawings do.
- Appropriate for the audience of the product.
- Easy to understand.
- Appropriate for the image of the NGO/CBO.
- Easy to produce with the NGO's/CBO's resources – in terms of skills and time, as well as money.

Handout: (Section 4.5)
Linking text and visual materials

Visual



Handout: (Section 4.5) Linking text and visual materials

Text

"In getting the project off the ground we faced two major challenges. At such an early stage in the epidemic, care was not yet on the agenda, and it was difficult to find both the motivation and the funding for anything other than prevention. A second obstacle was the conceptual wall between government and NGOs/CBOs. The popular perception of NGOs/CBOs by government is of four-wheel drives and expensive programmes that do not conform to government policy. The reciprocal view of government is one of corrupt and poorly motivated staff. Nevertheless when the teams got out there and realised how well they collectively met the community's needs for appropriate care, the wall began to come down and the partnership has gone from strength to strength."

Handout: (Section 4.6) Keeping information short

Introduction to report

This report shares the highlights and lessons learned from the second year of “Community Lessons, Global Learning” – a collaboration between the International HIV/AIDS Alliance and Positive Action, Glaxo Wellcome.

The Alliance is an international non-governmental organisation (NGO) that supports community action on HIV/AIDS in developing countries. To date, the Alliance has supported more than 1,100 community-based prevention and care initiatives in more than 13 countries in Africa, Asia and Latin America. Positive Action is Glaxo Wellcome’s long-term international programme of HIV education, care and community support.

“Community Lessons, Global Learning” was launched in October 1997. The aims of the three-year project are:

- To help community groups to improve the quality of their HIV/AIDS work – by learning from the successes and failures of other organisations working in a similar context both within their own country and in other continents.
- To improve the quality of support to community groups by regional and international policy-makers and donors – by communicating community level experiences and needs.

The theme of the first year of “Community Lessons, Global Learning” was moving beyond awareness raising in HIV prevention. The lessons and recommendations from the project were published in “Beyond Awareness Raising: Community lessons about improving responses to HIV/AIDS” – a report disseminated world-wide to more than 2,000 NGOs/CBOs, policy makers, people living with HIV/AIDS (PLHA) and donors.

Based on the lessons learned in the first year of the project, the theme of the second year was community care and support.

As in the previous year, the project was carried out through a series of intensive workshops – which focused specifically on sharing lessons and experiences to strengthen the capacity of community groups. In total there were three national workshops (Ecuador, Senegal and Zambia) and one regional workshop (Asia – with organisations from Bangladesh, Cambodia, India, Nepal, Philippines, Sri Lanka and Thailand).

Handout: (Section 4.6) ... continued

Keeping information short

The workshops enabled NGOs/CBOs, CBOs and PLHA to exchange their practical experiences, successes and problems around work in community care and support. To increase opportunities for learning, they also included participants from organisations outside of the Alliance, such as government, and national and international NGOs/CBOs. For example, the workshop in Ecuador involved representatives from the government (such as the Ministry of Education), donors (such as USAID), national NGOs/CBOs (such as the family planning association), United Nations (such as UNAIDS) and the corporate sector (such as Merck, Sharp and Dohme). The workshops also incorporated technical exchanges between different countries. For example, four representatives of the Alliance partner programme and local NGOs/CBOs from Burkina Faso participated in the workshop in Senegal, while staff from the programmes in Ecuador and Cambodia participated in the workshop in Zambia. In total, the second year of the project involved more than 182 participants from 15 countries in four workshops.

This document is based on the reports of the “Community Lessons, Global Learning” country and regional workshops held during the second year of the project. It also incorporates other documentation about the Alliance’s work in community care and support. As well as bringing together the relevant information, it aims to identify lessons learned and “good practice”, and to promote policy recommendations for future action. Therefore, while designed to be of interest to a variety of stakeholders in the global response to HIV/AIDS, it is particularly aimed at policy makers, donors and NGO/CBO support programmes.

(Reference: Adapted from a report on “Care, Involvement and Action: Mobilising and Supporting Community Responses to HIV/AIDS Care and Support in Developing Countries”, the International HIV/AIDS Alliance, July 2000.)

Handout: (Section 4.6)

Keeping information short

Useful ideas

- Remember that summarising takes longer than you think. So, give yourself plenty of time.
- Avoid trying to summarise information as a group. Instead, have one person take the lead, with the others supporting them.
- Make your writing “to the point” rather than descriptive, and make each point stand out clearly.
- Depending on the desired final length, consider these options to help to save space:
 - Use bullet points rather than paragraphs.
 - Use graphs and tables rather than text.

Steps for summarising information

The process of summarising information includes key steps, such as:

- 1** Read the information carefully and make sure that you understand it well.
- 2** Identify the main points being made and list them.
- 3** Group the main points into two or three key points.
- 4** Write a summary based on your two to three key points, making sure that it has a beginning, middle and end.
- 5** Re-read your draft summary to make sure that it contains all the essential points and communicates the same key information as the original, longer version.

Handout: (Section 4.7) Using simple language

Dear Mr R. Smith

Following your request, please find enclosed herewith for your perusal copies of the progress reports relating to the spectrum of **multi-sectoral** projects which are attached to our organisation. I need to advise you that the projects in which you have expressed an interest are at different stages of **implementation** in that they have from six to twelve months to run prior to the next stage of evaluation **methodologies** being applied. You will note that they include the development of a **sustainable** community-based model for women's reproductive health which has now evolved from a culture of dependence to a community-driven project which our organisation has facilitated through the implementation of community needs assessments. In addition, our organisation conducts a range of other work, including the examination of methods whereby implementation capacity can be strengthened, and the piloting of new models of integrated health and social care services. If you require further information exchange, I am happy to facilitate this.

Yours sincerely
Mrs P. Jones

Complex word	Simpler translation
Examples from the letter	
Multi-sectoral	
Implementation	
Methodologies	
Sustainable	
Other examples from participants	

Handout: (Section 4.8) Using appropriate and accurate language

Appropriate language

<i>Examples of words</i>	<i>First audience</i>	<i>Second audience</i>
Prostitute	People living with HIV/AIDS	Community elders
Multi-sectoral	Government	Community members
Penis	Community elders	District health nurses
Protease inhibitor	Traditional healers	Medical professionals
Capacity building	NGO/CBO staff	Business leaders
Oral sex	Media	Other HIV/AIDS NGOs/CBOs
Victims	People living with HIV/AIDS	Donors

Handout: (Section 4.8) Using appropriate and accurate language

Accurate language

<i>Phrases</i>	<i>Definitions</i>	<i>Answer</i>
<i>“You should practise safe sex”</i>	<p>Safe sex means sexual practices that are guaranteed to be 100 per cent safe.</p> <p>On the other hand, safer sex means sexual practices that aim to be as safe as possible.</p>	<i>“You should practise safer sex” is the accurate phrase.</i>
<i>“The man tested AIDS positive”</i>	<p>AIDS positive means that a person has had a blood test for Acquired Immunodeficiency Syndrome in their blood – which is not possible.</p> <p>On the other hand, HIV positive means that a person has had a test which shows HIV antibodies in their blood – showing the presence of the virus.</p>	<i>“The man tested HIV positive” is the accurate phrase.</i>
<i>“She caught HIV through sex”</i>	<p>To have caught HIV implies that is an airborne virus like the common cold. In fact, HIV is transmitted via bodily fluids and from mother to child, and is not airborne.</p> <p>On the other hand, to contract HIV means that someone becomes infected with the virus.</p>	<i>“She contracted HIV through sex” is the accurate phrase.</i>

Handout: (Section 4.9) Taking good photographs

Useful ideas

- Get to know your camera and what it can or cannot do. Read the instructions and practise using it. For example, make sure that you know how to load the film or use special features (such as a zoom lens).
- Buy the best quality film that you can afford. Don't let it get wet or too hot. Once finished, develop it as soon as possible.
- Think about the photographs you need before you take them. Make sure that they are relevant to your documentation work.
- Be relaxed, don't shake, and make sure that the image is in focus. Stand with your feet slightly apart.
- Take account of the conditions. For example, if the sun is behind people, their faces will be in shadow.
- Take active photographs. For example, of peer educators doing their work rather than receiving certificates for training.
- Use a flash for photography inside buildings. But remember that most flashes do not work at long distance.
- Do not take close-up photographs with a flash as people will appear blurred and with red eyes.
- Do not be too far from your subject. Make sure that they are close enough to be seen clearly.
- Be aware of the background of the image that you are photographing.
- If a photograph is very important, take two to three shots of the same image to make sure you get at least one good picture.
- If appropriate, ask people to stop or repeat what they are doing – so that you can get a good and clear photograph. Encourage them not to look false, however.
- Try not to get in people's way or to intrude on their privacy. Make sure that you have people's permission before taking photographs of them.
- Take a mixture of landscape (horizontal) and portrait (vertical) photographs – so that they can be used in different ways in materials.
- Note what you have taken photographs of, along with dates and names.

Handout: (Section 4.10) Using photographs well

Using photographs of people living with HIV/AIDS

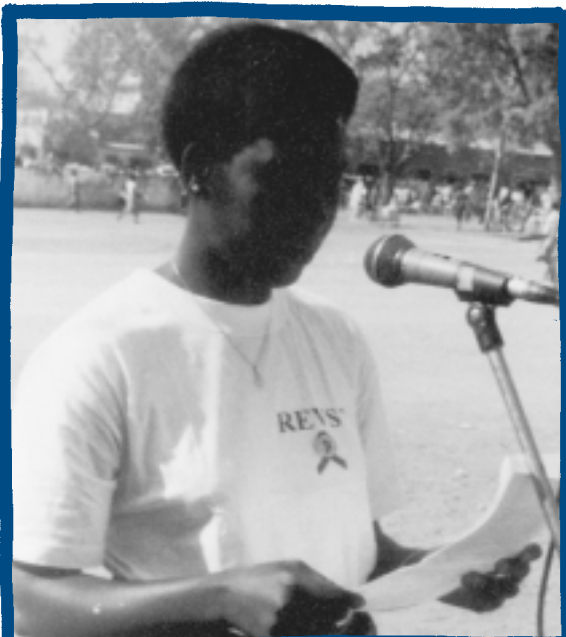


Members of a local NGO that involves people living with HIV/AIDS, at a community meeting in Burkina Faso.

Photograph 1

Questions:

- 1** What are the strengths and weaknesses of the photograph?
- 2** How could the photograph show people living with HIV/AIDS in a more active role?



A representative of a local NGO that involves people living with HIV/AIDS, making a presentation at a community meeting in Burkina Faso.

Photograph 2

Questions:

- 1** What are the strengths and weaknesses of the photograph?
- 2** What are the disadvantages of using a photograph that shows one individual person living with HIV/AIDS?

Handout: (Section 4.10) ... continued

Using photographs well

	<i>Photograph 1</i>	<i>Photograph 2</i>
Strengths of the photograph	<ul style="list-style-type: none"> ✓ The text on the T-shirts communicates a specific message. ✓ The photo is close up and well laid out. ✓ The confidentiality of the PLHAs is respected. ✓ The image shows that both men and women are living with HIV/AIDS. 	<ul style="list-style-type: none"> ✓ The image is clear, positive and strong. ✓ The image features a PLHA in an open and active role. ✓ The image shows a woman in a leadership role.
Weaknesses of the photograph	<ul style="list-style-type: none"> ✗ The T-shirts can only be understood if people speak French. ✗ Parts of the image are blurred. ✗ The people have their backs to the camera. ✗ The focus of the image is on words rather than action. ✗ It is not clear where the people are and what they are doing. 	<ul style="list-style-type: none"> ✗ The woman looks isolated. ✗ The image focuses on someone talking rather than taking action. ✗ The image does not show the community where the presentation is taking place.
Reply to the question about the photograph	<p>The photograph could show PLHA in a more active role by:</p> <ul style="list-style-type: none"> • Showing them as part of a group or a community, rather than on their own. • Showing them doing something active – such as leading a workshop or providing counselling. • Showing their faces – so that the audience can relate more easily to the people. 	<p>The disadvantages of using a photograph that shows one individual PLHA include that:</p> <ul style="list-style-type: none"> • It implies that HIV/AIDS only affects individuals, rather than families or communities. • PLHA do not appear to be part of a community. • It highlights the identity of the PLHA in question.

Handout: (Section 4.10) ... continued

Using photographs well

Using photographs of HIV/AIDS projects



Members of a local NGO carrying out HIV/AIDS awareness raising with rural workers in Cambodia.

Photograph 3

Questions:

- 1** What are the strengths and weaknesses of the photograph?
- 2** How can a photograph communicate the feel and emotion of a project?



Members of a local NGO with their kits for HIV/AIDS community care and support in Burkina Faso.

Photograph 4

Questions:

- 1** What are the strengths and weaknesses of the photograph?
- 2** What are the advantages and disadvantages of using a "staged" photograph of a project – rather than a natural one of people in action?

Handout: (Section 4.10) ... continued

Using photographs well

	<i>Photograph 3</i>	<i>Photograph 4</i>
Strengths of the photograph	<ul style="list-style-type: none"> ✓ The image is very positive – with happy, smiling faces. ✓ The NGO/CBO is shown in action in its rural community. ✓ The image shows communication between different types of people. ✓ The image shows the NGO's/CBO's approach to its work, for example its use of visual aids. 	<ul style="list-style-type: none"> ✓ The image shows that the NGO/CBO is equipped to do its work. ✓ The image is gender balanced. ✓ The image shows a little of the contents of the care kits, rather than just the boxes.
Weaknesses of the photograph	<ul style="list-style-type: none"> ✗ The hats block out some of the faces. ✗ Half of a person's body appears at the top of the image. ✗ The image seems to show a "teaching" rather than participatory approach. 	<ul style="list-style-type: none"> ✗ The image looks very "staged" and formal. ✗ The image does not show the NGO/CBO putting care and support into action. ✗ The image does not show the context of where the work is taking place.
Reply to the question about the photograph	<p>A photograph can communicate the feel and emotion of a project by:</p> <ul style="list-style-type: none"> • Showing reactions on the faces of those participating – such as their laughter or tears. • Showing what the work involves in practice – such as what form it takes and where it occurs. 	<p>The advantages and disadvantages of using a "staged" photograph of a project – rather than a natural one of people in action – include that:</p> <ul style="list-style-type: none"> • It is possible to control the image and get it exactly how you want it. • It makes the image look false and unnatural.

Using photographs of training workshops

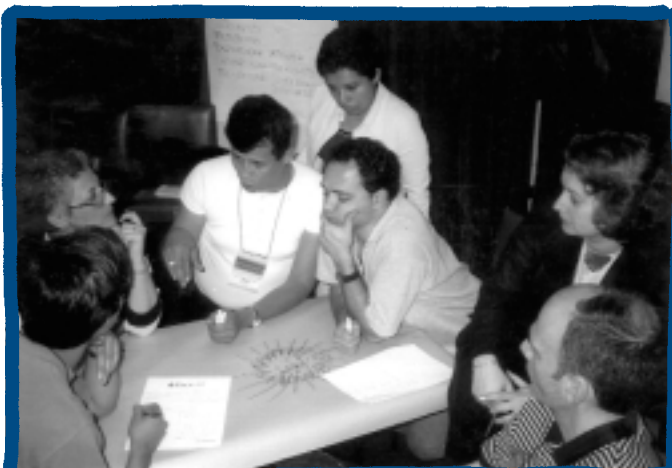


Participants discussing the results of an advocacy skills-building workshop for local NGOs/CBOs in Zimbabwe.

Photograph 5

Questions:

- 1 What are the strengths and weaknesses of the photograph?
- 2 What are the advantages and disadvantages of photographs that show the results of a workshop rather than its activities?



Participants at a training workshop on external relations for local NGOs/CBOs in Brazil.

Photograph 6

Questions:

- 1 What are the strengths and weaknesses of the photograph?
- 2 How can a photograph communicate the feel and atmosphere of a workshop?

Handout: (Section 4.10) ... continued

Using photographs well

	<i>Photograph 5</i>	<i>Photograph 6</i>
Strengths of the photograph	<ul style="list-style-type: none"> ✓ The image shows that the workshop involved sharing a lot of ideas and experiences. ✓ The image shows that both men and women are involved. ✓ The title of the displays communicate some of the main themes of the workshop. 	<ul style="list-style-type: none"> ✓ The image shows that the participants are actively involved and interested. ✓ The image shows participants exchanging ideas and working as a team.
Weaknesses of the photograph	<ul style="list-style-type: none"> ✗ The image shows people after action has taken place rather than during it. ✗ The image shows the backs of people's heads rather than their faces. 	<ul style="list-style-type: none"> ✗ The image does not show the outcome of the activity. ✗ The flipchart in the background distracts from the subject matter.
Reply to the question about the photograph	<p>The advantages and disadvantages of a photograph showing the results of a workshop rather than the activities are that:</p> <ul style="list-style-type: none"> • It shows what has been achieved. • It gives too much attention to written outputs rather than increased skills. 	<p>A photograph can communicate the feel and atmosphere of a workshop by:</p> <ul style="list-style-type: none"> • Showing who participated. • Showing what type of activities the participants did. • Showing how the participants reacted to the activities.

Handout: (Section 4.11)

Useful ideas

General points for making good visual aids

- ✓ Make them attractive – for example by using strong colours, bullet points and diagrams. Limit each line of text to six words or less – avoid blocks of text by only including the key points.
- ✓ Make sure the headings are clear – both visually and as a summary of what is being presented.
- ✓ Use them to communicate the “human angle” of your work, for example by using photographs or drawings.
- ✓ Keep them simple and don’t overload them with information.
- ✓ Write clearly.
- ✓ Number them.
- ✓ Make them add value to the text rather than disrupt its flow.
- ✓ Use words or phrases rather than whole sentences.
- ✓ Ensure they reinforce your key messages.
- ✓ Ensure that they add to your presentation, rather than repeat word-for-word what you are saying.
- ✓ Use simple diagrams – unless there is a need and time to explain more complex ones.
- ✓ Limit the number to one visual aid per five minutes of presentation.
- ✓ Make sure that the presentation does not include too many visual aids – so that people listen to what is said.

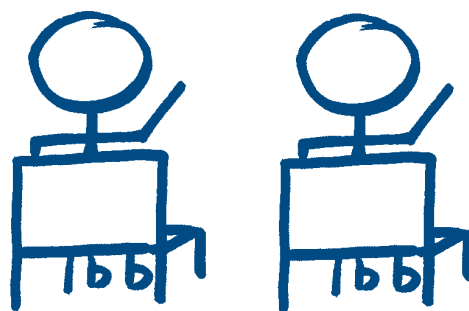
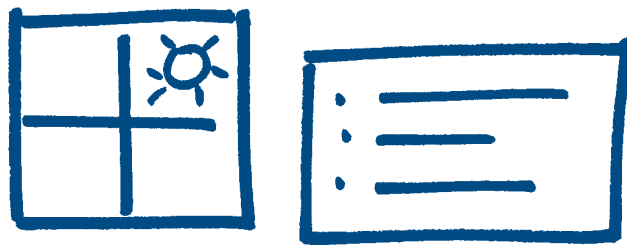
Specific points for making good flipcharts

- ✓ Limit each line of text to six words or less, with spaces in between the lines.
- ✓ Make letters at least 8cm high – so that they can be read from a distance.
- ✓ Avoid “over-writing” letters – so that they become distracting and difficult to read.
- ✓ Tear or cut the sheets of flipchart neatly.
- ✓ Store the flipcharts by rolling them up rather than folding them.
- ✓ Consider writing the flipchart so that it can be unfolded gradually to reveal each point in turn during the presentation.
- ✓ Store the flipcharts by rolling them up rather than folding them.

Specific points for making good overhead transparencies

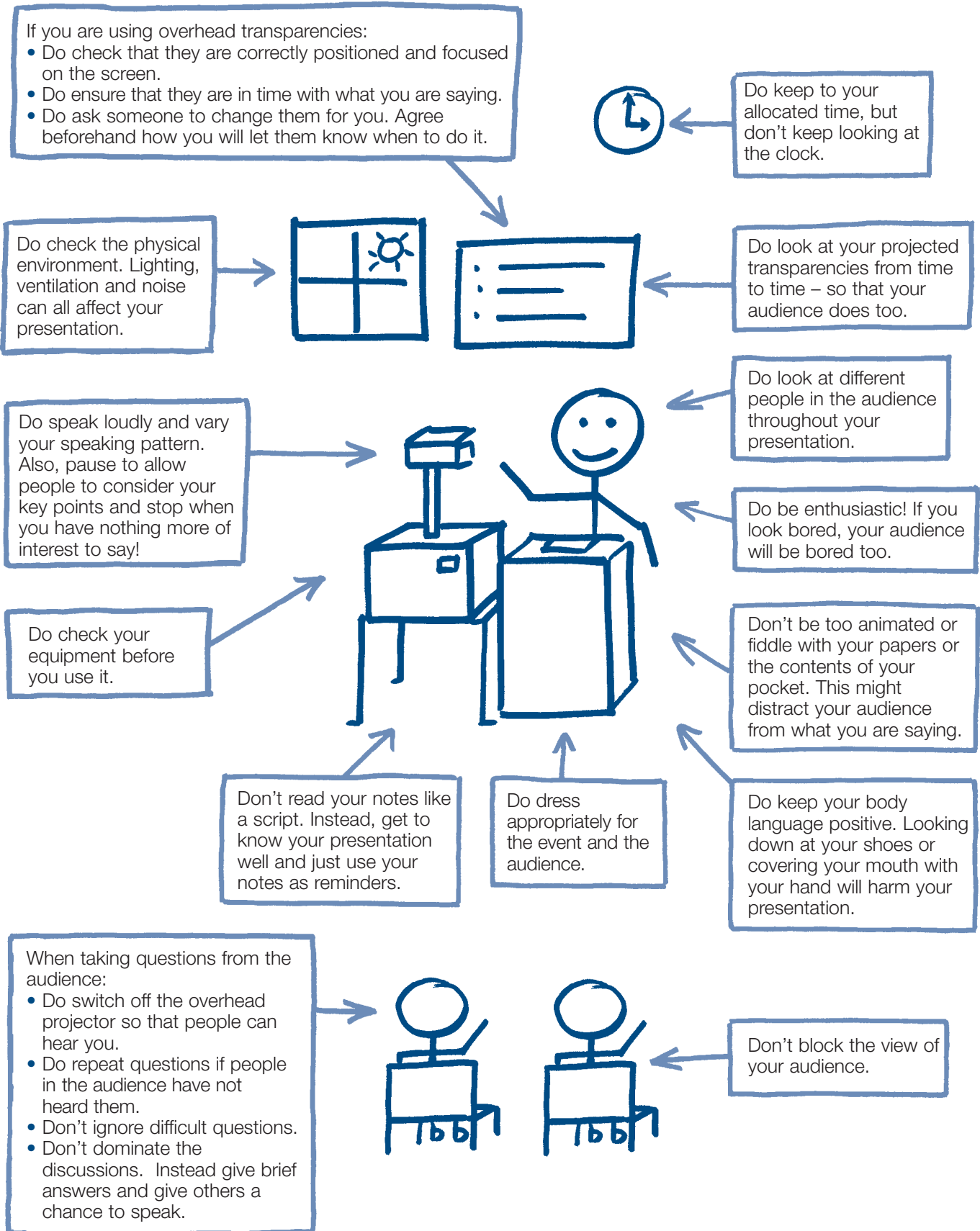
- ✓ Use the right type of transparencies (for example ones that can be photocopied).
- ✓ Use the right pens for transparencies and make alterations with a clean, damp cloth.
- ✓ Use a font size that is at least 18 point – so that it can be read from a distance – and is in bold.
- ✓ Leave a margin at the edge of the transparency for clear projection.
- ✓ Store the transparencies carefully, and keep them away from heat and damp.
- ✓ Number the transparencies in case you drop them!

Handout: (Section 4.12) Delivering effective presentations



Handout: (Section 4.12) ... continued

Delivering effective presentations



Information cards - for developing documentation and communication products

Section 5

Contents

<i>Information card 1:</i>	Case study
<i>Information card 2:</i>	Newsletter
<i>Information card 3:</i>	Leaflet
<i>Information card 4:</i>	Workshop report
<i>Information card 5:</i>	Abstract
<i>Information card 6:</i>	Annual report
<i>Information card 7:</i>	Presentation
<i>Information card 8:</i>	Policy report
<i>Information card 9:</i>	Photo-story book
<i>Information card 10:</i>	Video
<i>Information card 11:</i>	Website
<i>Information card 12:</i>	Radio programme

Summary of Section 5

Section 5 contains Information cards to help participants to develop specific documentation and communication products.

Each Information card is four pages long. The first page includes an introduction to the product and key questions to ask before starting to develop it. The centre pages use an example to highlight some practical “dos and don’ts” about structure and content. Finally, the back page focuses on issues about style.

This section is important because it helps participants to focus on the specific documentation and communication products that they want to produce. It helps them to think through the pros and cons of those products, and the technical issues involved. This helps them to plan and produce products that will be as creative and effective as possible.

Style

This page looks at the style of case studies – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

Use a friendly style for your case study – including quotations and stories – unless it is for a very formal audience.

Include photographs and/or drawings in your case study – to help the reader “picture” the situation being described.

Keep your case study concise and avoid irrelevant information. Cut out text until it is as brief as possible.

Keep the language in your case study simple. Avoid abbreviations (e.g. FPA) and jargon.

Use visuals – such as drawings – to give “human interest” to your case study. For example, the International HIV/AIDS Alliance used a photograph with this case study in the policy report “Care, Involvement and Action: Mobilising and supporting community responses to HIV/AIDS care and support in developing countries”, July 2000.



What is a case study?

INFORMATION CARD

A case study is a documentation and communication product that describes and summarises an example of a person, project or organisation.

A case study:

- ✓ Can be used on its own or as part of other materials – to make them more interesting by adding some real examples.
- ✓ Is useful to link theory and practice. For example, it can show how an NGO's/CBO's policies have been put into action.
- ✓ Is brief and concise, usually no more than two to three pages of text or two to three minutes of video or radio.
- ✓ Combines factual details with other information – such as quotations and stories – to give an insight into the subject.
- ✓ Can use information from a number of sources – including existing ones (such as quarterly reports) and new ones (such as interviews with community members).

Key questions

Key questions to ask *before* developing a case study are:

- ? Whether the people or organisations in your case study are aware of how it might be used, and what the consequences might be? If they request it, can you ensure their confidentiality?
- ? Is the subject matter of your case study a good enough example to illustrate your key messages? Will it convince others?
- ? Can you easily access the right type of information needed for your case study? If not, what practical steps will you need to take to get it?

Structure and content

These pages show an example of a structure and content outline for a written case study about an NGO/CBO involved in HIV prevention. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make a case study as effective as possible.

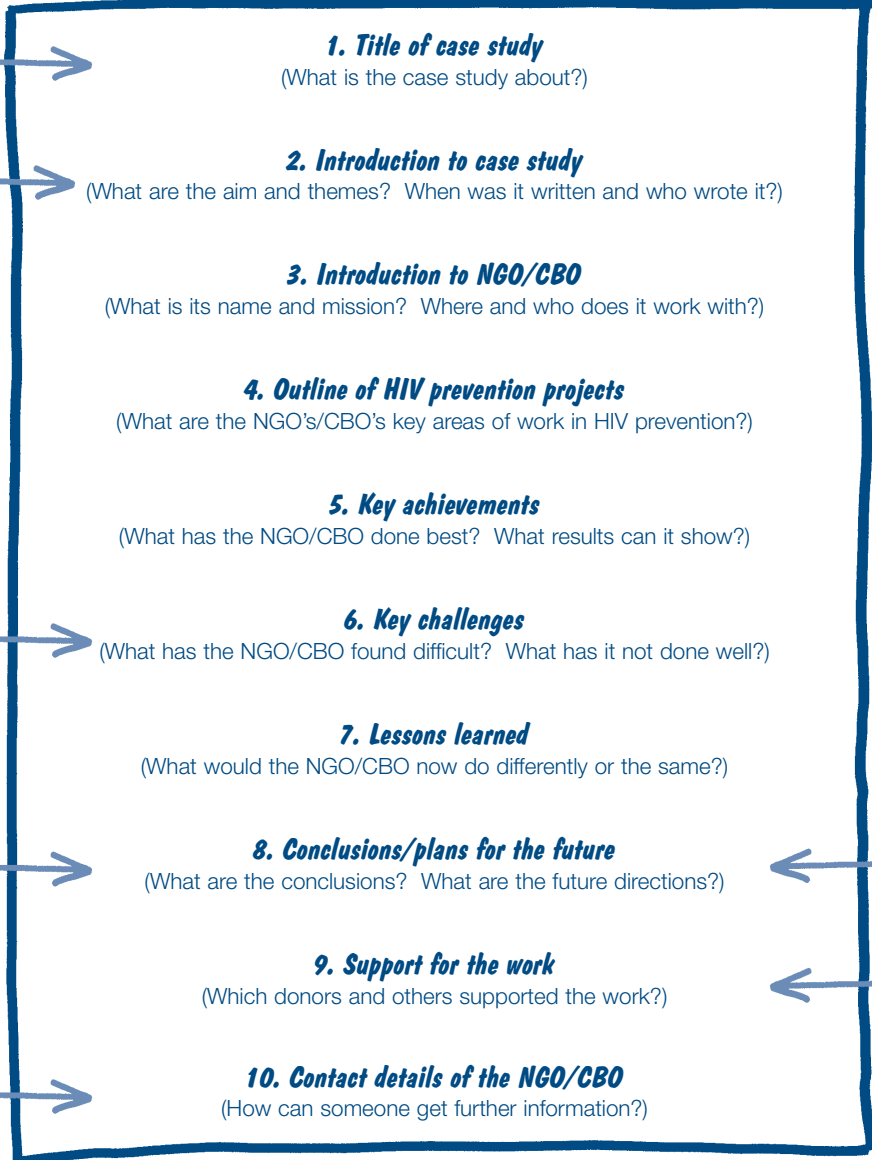
DO use a title that catches people’s attention.

DO use your introduction to emphasise your two to three key messages.

DO be honest about challenges and weaknesses, but avoid using people’s names if negative issues are mentioned, unless you have their permission.

DON’T draw conclusions if the information in the case study does not support them.

DO encourage feedback from your audiences and ensure that they know how to contact you.



DON'T publish information about people without asking their permission. Respect requests to change or remove details.

DO prepare clear questions for interviews to gather your information. Focus on “open” questions (which allow people to describe things) rather than “closed” questions (which only get “yes” or “no” answers). (See Section 4.2: “Preparing an effective interview” for more information.)

DO express your future plans in a positive way that shows a clear link with your past experiences.

DO give credit to those who contributed – whether the support was financial, technical, political or “in kind”.

Style

This page looks at the style of newsletters – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

Make sure that your newsletter is easy to use and has clear structure for its readers to follow. For example, number the pages and include a contents list.

Make sure that the style of your newsletter complements your NGO's/CBO's other materials, such as leaflets and annual reports.

Use visuals to liven up your newsletter. Make sure that each one illustrates a specific point and has a caption explaining what it is.

Choose one person to edit all of the pages of the newsletter – to make sure that the style is consistent throughout.

Think of a name for your newsletter that has a connection to your NGO/CBO. Make sure that it is easy to remember and is not being used by another group. For example, Network of Zambian People living with HIV/AIDS (NZP+) use the title "NZP+ News".



What is a newsletter?

INFORMATION CARD

A newsletter is a documentation and communication product that provides a regular update about an organisation or a project.

A newsletter:

- ✓ Can be used to raise the profile of an NGO/CBO, share its work and promote its position on topical issues.
- ✓ Can include factual information and stories about a wide range of subjects, including projects, people, policies, partnerships, points of view, resources or future events.
- ✓ Can be used to communicate information both within an organisation and externally.
- ✓ Follows the same basic format for each edition.
- ✓ Is issued regularly, for example every month, quarter or year.
- ✓ Can be as short as one page or as long as twelve pages plus. But it should only be as long as is necessary and possible, considering the resources of the NGO/CBO.

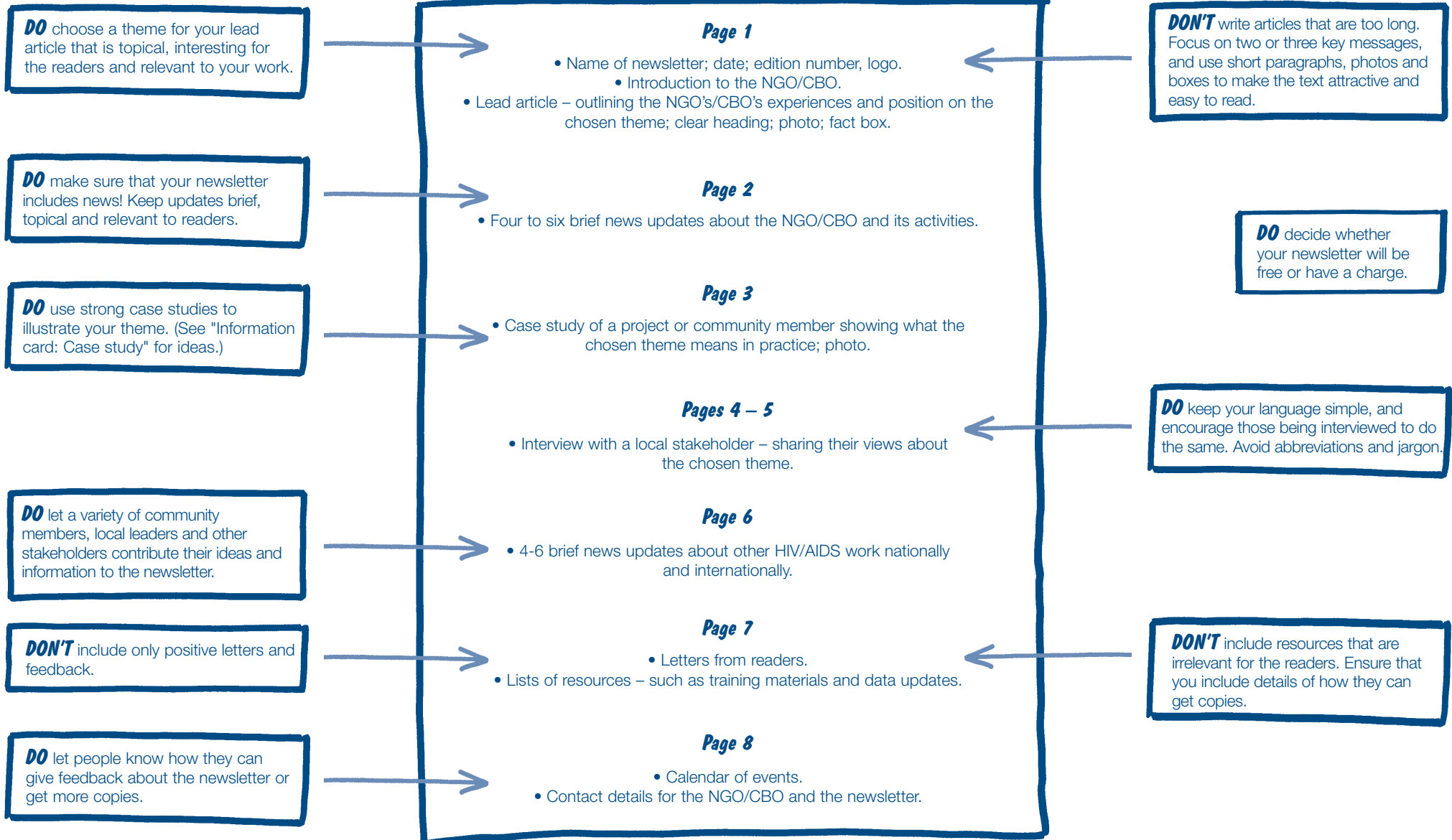
Key questions

Key questions to ask *before* developing a newsletter are:

- ? How long will it be and how often will the newsletter be produced? Will you have enough time and resources to keep producing it regularly?
- ? Who will take decisions about the newsletter – such as what information to include and what views to promote? How will they get input, ideas and agreement from others?
- ? Who are the priority audiences for the newsletter? What difference does that make to its content and style?

Structure and content

These pages show an example of a structure and content outline for a newsletter by an NGO/CBO involved in HIV/AIDS. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make a newsletter as effective as possible.



Style

This page looks at the style of leaflets – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

Use a design that will be attractive to your audiences and make your leaflet stand out from others.

Choose the right shape of leaflet for your dissemination needs – for example to fit a specific size of envelope or leaflet dispenser.

Avoid over-designing your leaflet with a style that looks very expensive or technical – as this may give a false impression of your NGO/CBO.

Keep your text simple and clear, and focus on making your leaflet a quick and exciting read.

Use simple charts and diagrams in your leaflet – to illustrate what your NGO/CBO is doing. For example, HIV/AIDS STD Alliance of Bangladesh (HASAB) used a map in their leaflet to show the location of the projects that they support.



What is a leaflet?



A leaflet is a documentation and communication product that provides an introduction to and an overview of an organisation or a project.

A leaflet:

- ✓ Can be used to promote an NGO/CBO and its work, publicise services or events, and communicate specific messages.
- ✓ Contains brief and clear information to provide a clear and simple overview rather than a detailed description.
- ✓ Can target very broad audiences (such as the general public) or very specific audiences (such as donors).
- ✓ Is short – usually no more than two sides of A4 paper (the size of this page).

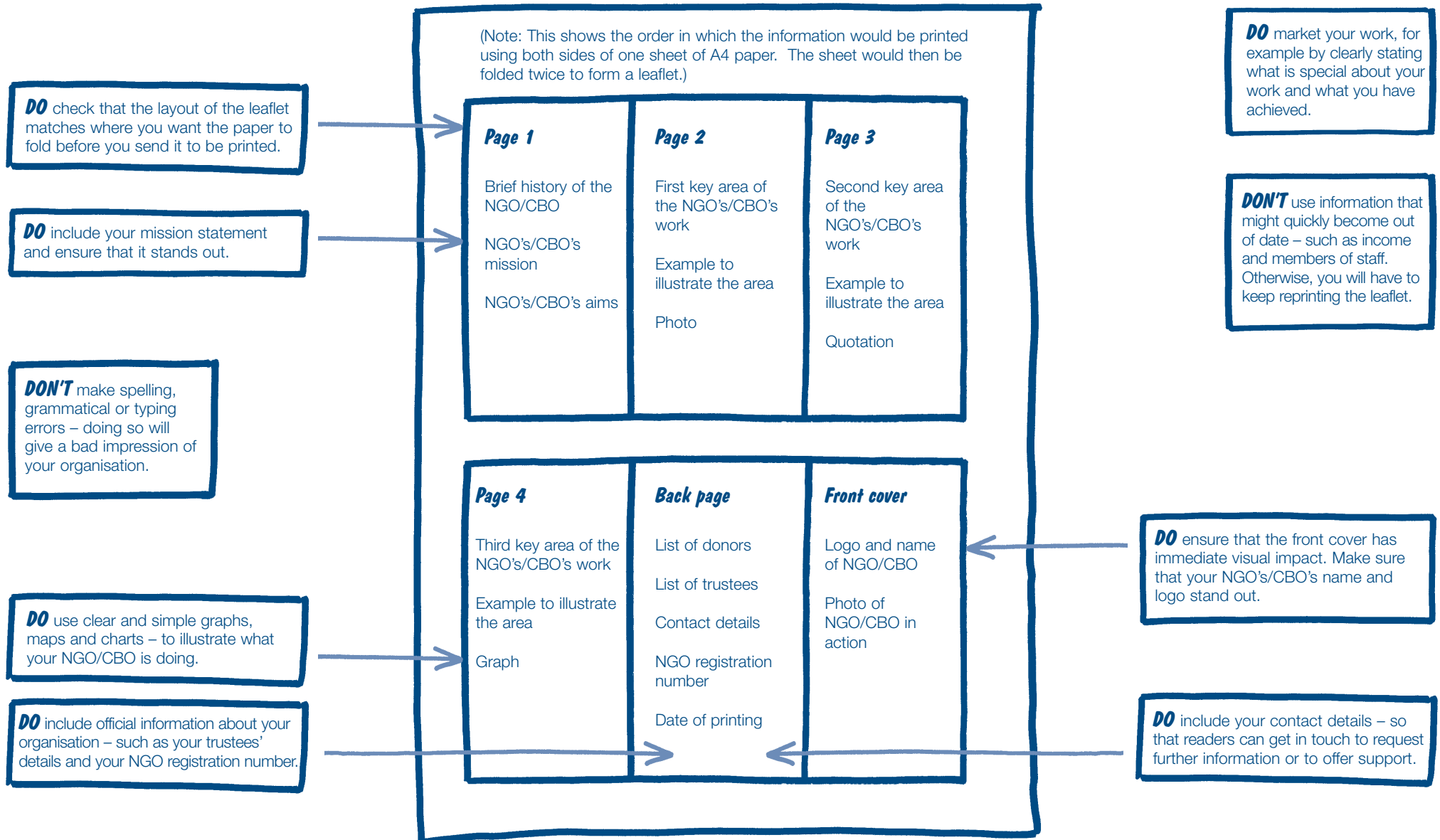
Key questions

Key questions to ask *before* developing a leaflet are:

- ? Is the audience for the leaflet general or specific? How does this affect the type of information you need to include?
- ? What image or “look” do you want the leaflet to present of your NGO/CBO? Will it match the image in your other communications materials?
- ? How many copies of the leaflet will you need to print? How does this affect the style you choose – such as the number of colours and the type of paper?

Structure and content

These pages show an example of a structure and content outline for a leaflet about an NGO/CBO working on HIV/AIDS. The outline shows what the product will contain and in what order. The boxes around it provide some key "dos and don'ts" about how to make a leaflet as effective as possible.



Style

This page looks at the style of workshop report – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

What is a workshop report?

INFORMATION CARD

A workshop report is a documentation and communication product that records the key activities and results of a workshop or meeting.

A workshop report:

- ✓ Can be used to share the methodologies, lessons learned and results of a workshop or meeting.
- ✓ Provides a summary of highlights of the workshop, rather than a word-for-word account.
- ✓ Can target the people who participated in the event and/or external audiences.
- ✓ Should be thorough, but concise – usually not more than 25 pages long.

Key questions

Key questions to ask *before* developing a workshop report are:

- ? Is the main audience for the workshop report the participants or others? What difference does this make to the content?
- ? Is the workshop report written to be of practical use, such as to show how methodologies have been used, or is it written to share the experiences and discussion points? How will this affect the information gathered and structure?
- ? How will the information for the report be collected during the workshop? Who will do what? Are there enough people to document all of the sessions?

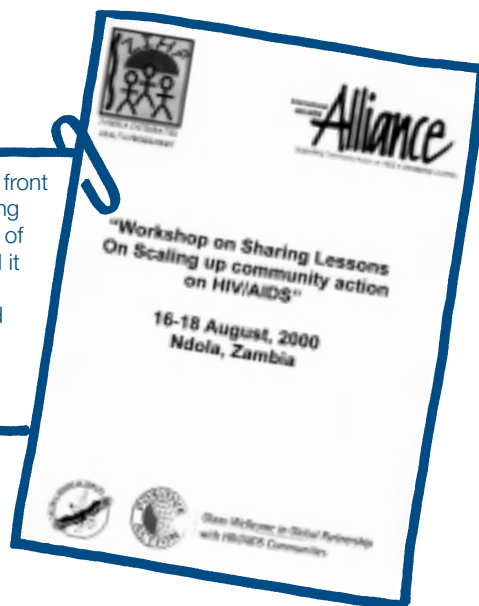
Reflect the style of the workshop in the style of your workshop report. For example, was the workshop formal or informal, participatory or presentation-based?

Include case studies, stories and drawings in your workshop report – to bring it to life and explain difficult ideas.

Use a clear structure in your workshop report – so that it is easy to use. For example, organise the information into sections, number the pages and include a contents list.

Use photos to illustrate the nature of the workshop, but ensure that permission has been given by the people in the photos so that their confidentiality is respected.

Use a strong and simple design for the front cover of your workshop report – showing the key information, such as the theme of the workshop, the date, who organised it and who funded it. For example, the International HIV/AIDS Alliance included the logos of the partner organisation at the top of the page and those of the donors at the bottom.



Structure and content

These pages show an example of a structure and content outline for a workshop report on sharing lessons learned about HIV/AIDS community care and support. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make a workshop report as effective as possible.

DON'T cover the general introductory information in much detail. Save the space for the main contents of the workshop.

DO acknowledge the donors for the workshop on the cover and/or in the introduction to the report.

DO be systematic about collecting information for the report. For example:

- Ask if copies of presentations will be available before taking notes.
- Copy out flipcharts while the context is fresh in your mind.
- Date and label the information that you gather.
- Write your notes in clear handwriting or straight into a computer.
- Use breaks and evenings to review your notes and to clarify anything that is not clear.

DO check your understanding of key conclusions after each day with the workshop facilitators.

DO include feedback about how the participants felt about the workshop.

List of abbreviations

- 1. Executive summary**
- 2. Introduction**
 - 2.1 Background to the workshop
 - 2.2 Timing and participation
 - 2.3 Expectations, objectives and process
 - 2.4 Facilitation and methodologies
- 3. Overview of care and support activities**
 - 3.1 Overview of care and support activities
- 4. Themes**
 - 4.1 Community home-based care (methodologies, experiences, lessons)
 - 4.2 Continuum of care/referral systems (methodologies, experiences, lessons)
 - 4.3 Involvement of people living with HIV/AIDS (methodologies, experiences, lessons)
 - 4.4 Orphans and vulnerable children (methodologies, experiences, lessons)
- 5. Putting lessons into practice**
 - 5.1 Developing participants' action plans
- 6. Conclusions**
 - 6.1 Summary of conclusions
- 7. Evaluation**
 - 7.1 Summary of workshop evaluation

Annex 1: Participant list
Annex 2: Workshop schedule

DO explain complex terms in full. If appropriate, translate them from or to the local language.

DO keep the Executive Summary focused on the key details and limited to one to two pages.

DO draft an outline of the report and check it with the workshop organisers before you start writing it.

DO use a similar format for each of the key themes – so that the readers know what to expect.

DON'T include all of the materials produced by all of the participants if you do not have space. Instead, include a few good examples.

DON'T use annexes to add extra information. Instead, use them to include essential information which would otherwise disrupt the flow of the report.

Style

This page looks at the style of abstracts – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

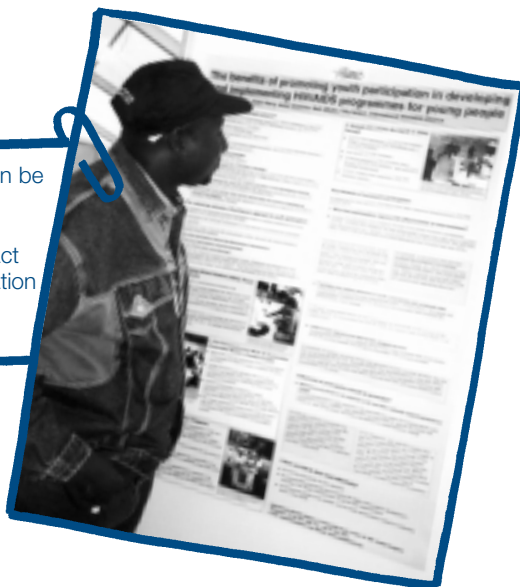
Follow the guidelines for the style for your abstract. For example, keep to the instructions about the size of lettering and spacing between lines.

Use an interesting and lively style for your abstract – so that it will grab the attention of the conference organisers.

Keep your language simple in your abstract. Avoid jargon and abbreviations – so that the conference organisers understand exactly what you are trying to say.

Combine information that is quantitative (i.e. to do with numbers) and qualitative (i.e. to do with feelings) in your abstract – to make it convincing.

Use a style for your abstract that can be used for your presentation. For example, the International HIV/AIDS Alliance used the text of their abstract as the basis for this poster presentation at the XIII International AIDS Conference in Durban in July 2000.



What is an abstract?

INFORMATION CARD

An abstract is a documentation and communication product that provides a written summary of an area of work – so that it can be considered for presentation at a conference.

An abstract:

- ✓ Provides a concise summary of the key activities, results and lessons from an area of work.
- ✓ Is the basis for deciding whether an organisation's work will be accepted for a presentation at a conference, and whether that presentation will be spoken (oral) or written in the form of poster.
- ✓ Follows a strict set of guidelines produced by the conference organisers, including set headings, size of font and number of words.
- ✓ Has to meet a set deadline – usually several months before a conference.

Key questions

Key questions to ask *before* developing an abstract are:

- ? Is the theme of your abstract directly relevant to the theme of the conference? Or would a different conference or communication activity be more suitable?
- ? What do you have to say that is particularly special? What results and lessons can you share that will support the work of others?
- ? What format do you need to use for the abstract? Have you got the right information to follow the format?

Structure and content

These pages show an example of a structure and content outline for an abstract developed by an NGO/CBO support programme involved in HIV/AIDS. The outline shows what the product will contain and in what order. The boxes around it provide some key "dos and don'ts" about how to make an abstract as effective as possible.

DON'T ignore the guidelines about the structure of the abstract. For example:

- Follow the headings given.
- Keep to the word limit.
- Do a photocopy of the blank form and see if your text fits it before using the actual form.

DON'T exaggerate your results. Try to:

- Predict what they will be by the time of the conference.
- Use words such as "estimated" or "approximately" if you are unsure of the data.
- Be specific and avoid vague statements like "results will be discussed in the presentation".

DON'T re-use your own past abstracts or copy those of others.

DO check that your submission is complete and that you have provided all of the information requested.

DO get approval from co-authors and project partners before submitting the abstract.

Harm-reduction and community mobilisation with injecting drug users on Bangladesh/India border

Issue

Despite extreme vulnerability to HIV, no programmes existed to participatively address the needs of injecting drug-users (IDUs) in Bangladesh, especially on the Indian border.

Project

Society for Health, Economy, Agronomy and Self-Sufficiency (SHEASS), a community group, developed a new harm-reduction strategy with IDUs in Rajshahi, an urban centre near the border. With technical and organisational support from HASAB NGO support programme, they redesigned a traditional detoxification centre into a project based on the needs of the community. It included:

- Community outreach to drug users and their families about drug use, sexual health and sexuality
- Centre-based treatment for STIs and injection-related infections
- Needle exchange
- Condom distribution
- Training of peer educators
- Anti-discrimination campaign in the community.

Results

In its first year, SHEASS changed from an anti-drug centre to a health centre and gave regular support to more than 100 drug users and their families. Between February and November 1997, the monthly number of treatment sessions rose from 107 to 450, and the number of syringes exchanged increased from 7 to 225. The number of condoms distributed almost tripled. Qualitative results include:

- Professional blood-donors increasingly asked for help to change their practices
- Women were reached as well as men, and became more open to participation
- The self-esteem of the children of drug users increased
- Stigmatisation by community members diminished. The results were monitored and documented by HASAB – as the basis of a "best practice" harm-reduction model to be replicated elsewhere in Bangladesh and Asia.

Lessons learned

It is vital to:

- Base responses on the real needs of IDUs and their community
- Mobilise the whole community – including local leaders – and build a good rapport
- Address the specific needs of wives and children
- Combine promoting harm-reduction strategies with practical services, such as needle exchange.

Location: Bangladesh

Choice 1: Track/category C41; Choice 2: Track/category C20

Contact author: Mahbooba Akhter Kabita, HASAB NGO Support Programme, c/o CDS 38/1 Block F Ring Road Shyamoli, Dhaka, Bangladesh. Tel: +880 2 822. Fax: +880 2 815. E-Mail: cds@bdmail.net .

Co-authors: Hossain A., Islam A., SHEASS, Dhaka, Bangladesh.

DO grab people's attention – by providing strong summaries of your work in the title and first line.

DO highlight what is special about your work – as your abstract may be competing with hundreds of others.

DON'T miss the deadline for abstracts – which is usually months before the conference.

DO think carefully about which "track" or part of the conference to apply to. Find one that really suits your subject – so that your abstract stands a good chance of being chosen.

DO take time to decide upon the primary author. For example, who will represent the work best and who would benefit from the conference.

Style

This page looks at the style of annual reports – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

Use a simple and positive style for your annual report – so that it is within your budget and successfully describes your organisation.

Use a style for your annual report that meets the needs of your audiences. For example, donors will want to see financial data presented clearly and transparently.

Ensure that the style of your text and images used complement each other – so that your annual report reflects the true nature of your NGO/CBO and the range of its work.

Use plenty of photographs, quotes and stories to illustrate your work – but ensure that their nature and balance reflects the true nature of your NGO/CBO and the range of its work.

Some organisations publish a biennial report that covers two years of their activities. Note how the International Community of Women Living with HIV/AIDS (ICW) used three languages on the front cover of its biennial report to emphasise the international nature of their organisation. The photos show a network meeting and different activities carried out around the world.



What is an annual report?

INFORMATION CARD

An annual report is a documentation and communication product that provides a summary of an organisation's work, achievements and lessons during a year. Some organisations produce a report once every two years; these documents are called biennial reports.

An annual report:

- ✓ Provides a yearly comprehensive overview of an organisation's aims, activities, results, lessons and directions.
- ✓ Is an important public relations tool that can be used any time during the year to promote an organisation.
- ✓ Is an official document and may need to meet specific requirements (e.g. a financial summary).
- ✓ Combines factual data with other information – such as photographs and quotations – that give a real impression of the organisation's work.
- ✓ Mainly targets external audiences (such as donors, government and other NGOs/CBOs), but can also benefit internal audiences (such as staff, volunteers and board members).

Key questions

Key questions to ask *before* developing an annual report are:

- ? How can your NGO/CBO get the most out of producing its annual report? How can it use the opportunity to reflect on its lessons and to improve its future work?
- ? Does the annual report need to meet any official requirements? For example, do you have to send a copy to a government department or include a note from the auditors with the financial accounts?
- ? When can you realistically produce the annual report? When will all the information you need – including the final financial accounts – be available?

Structure and content

These pages show an example of a structure and content outline for the annual report of an NGO/CBO working on HIV/AIDS. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make an annual report as effective as possible.

DON'T try to cover every project in detail in the introduction, but provide an overview of the organisation’s work. Encourage input from colleagues, but take editorial decisions based on what is right for the report.

DON'T make the introduction too wordy, but do include the basic information (such as your mission statement and the key highlights of the year).

DO use the same basic format for each area of work, combining an overview with some real-life examples.

DO include information about who is involved in the organisation and what they do. In particular, include information about the key decision – makers and senior management.

DON'T try to cover everything about your plans. Instead, end on a positive note – by showing how the lessons and results from the past year will be used to strengthen your future work.

1. **Letter from the Chair of the Board**
2. **Letter from the Executive Director**
3. **Introduction**
 - NGO's/CBO's mission statement
 - Aim and structure of the annual report
 - Overview of the year
4. **Area of work 1:**
 - Introduction
 - Summary of activities and results
 - Case study; photos; quotations
5. **Area of work 2:**
 - Introduction
 - Summary of activities and results
 - Case study; photos; quotations
6. **Area of work 3:**
 - Introduction
 - Summary of activities and results
 - Case study; photos; quotations
7. **Resources and support**
 - Donors
 - Income and expenditure
8. **Governance and staffing**
 - Board of Trustees
 - Staff and volunteers
9. **Directions for the future**
10. **Contact details**

DO use letters to provide a strong and inspiring start. Ensure that they:

- Each say something different.
- Complement each other.
- Reinforce your key points.
- Are written in a lively style.

DO ensure that all of your information is as accurate as possible. Ensure that the final report is proofread by at least two people – to check both the text and the design.

DO give credit and thanks to those who have supported you.

DO make your financial accounts as clear as possible, for example by using visuals – such as pie charts and graphs.

Style

This page looks at the style of presentations – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

What is a presentation?



A presentation is a documentation and communication product that provides a verbal – and often visual – report on an organisation or an area of its work.

A presentation:

- ✓ Can be used to share what an NGO/CBO has achieved, learned and thinks – either in general or about a specific subject.
- ✓ Targets a specific audience – ranging from an individual donor to hundreds of participants at a conference.
- ✓ Needs to suit the event in question – for example, fit within the given time limit and link clearly to the theme in question.
- ✓ Must be interesting and attention-grabbing, providing insights and provoking questions.
- ✓ Can be accompanied by visual aids – such as flipcharts, overhead transparencies and slides.

(Note: Support in how to improve presentation skills can be found in "Section 4.12: Delivering effective presentations".)

Key questions

Key questions to ask *before* developing a presentation are:

- ? What is the presentation really about? Does what you want to say match what you have been asked to discuss? Do you have the right type and amount of information to say something useful and interesting?
- ? Who is the audience for the presentation? What is their level of knowledge and interest about the subject? How will this affect your style and content?
- ? How much time do you have for the presentation? How can you use it to highlight your two to three most important points? What level of detail can you cover?

Remember that the language of spoken presentations is less formal than you would use for a written report. You can use short and snappy sentences to emphasise key points in your presentation. If possible try to use bullet point notes for your presentation rather than read from full text.

Practice your presentation out loud – so that you know how its style comes across and how long it takes.

Use attractive visual aids – such as flipcharts or overhead transparencies – to add "human interest" to your presentation.

Make sure your presentation is appropriate – so that it suits the knowledge and interest of the audience.

Ensure that the notes for your presentation remind you where to use visual aids. For example, the International HIV/AIDS Alliance noted the number and contents of the visual aids in one column and the text of the presentation in another. From: an Alliance presentation on "Community Lessons, Global Learning" project, 1999.

Structure and content

These pages show an example of a structure and contents outline for a presentation by an NGO/CBO involved in community action on HIV/AIDS. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make a presentation as effective as possible.

DON'T forget to say hello and to thank people for the opportunity to make a presentation.

DON'T use your introduction to try to address everything that the previous speaker has said (if you are in a panel of speakers). Instead, make a brief link to their main theme and then keep to your prepared presentation.

DO plan exactly how and when to use your visual aids, and show on your notes when to change them.

DO highlight some points that you can leave out if you are running out of time.

DO identify the two or three key points that you want to make and ensure that they are:

- Reinforced at the beginning and end of your presentation.
- Explained one by one in the middle of your presentation.
- Backed up by concrete examples, data and references.

Slide # 1 *Welcome and thanks*

Slide # 2 *Introduction*

– to the presenter, main theme, key points and structure of the presentation

Slide # 3 *Background*

– to the NGO/CBO, project, community and HIV/AIDS situation

Slide # 4 *First key point*

– summary of activities and results, lessons learned, and an example

Slide # 5 *Second key point*

– summary of activities and results, lessons learned, and an example

Slide # 6 *(*) Third key point*

– summary of activities and results, lessons learned and an example

Slide # 7 *Summary of results and lessons learned*

Slide # 8 *Conclusions*

Slide # 9 *Thanks*

DON'T just start to write your presentation. Instead, develop an outline to show the flow of the information. Make sure it has a clear:

- Beginning – to introduce your theme and key points.
- Middle – to communicate the majority of your information.
- Conclusion – to wrap-up your key points.

DO prepare your outline in the way that works best for you. For example, some people use bullet points to remind them of the key points, while others prefer to write the text in full.

DO make sure that your conclusions are clearly linked to your key points and results.

Style

This page looks at the style of policy reports – meaning how they are designed. It provides some ideas about how to make them as interesting and attractive as possible.

Balance the style and content of your policy report. Remember that a report with good information but bad presentation will be hard to follow, while a report with beautiful design but poor content will be unconvincing.

Bring the issues in your policy report to life – by including case studies, stories and visuals.

Use an assertive and authoritative style for your policy report, but also be honest about your relevant weaknesses and lessons learned.

Keep the tone of your policy report confident and authoritative. Avoid spelling and grammatical mistakes that might detract from the importance of what you are saying.

Make it clear who has produced your policy report – so that it helps to raise your NGO's/CBO's profile. For example, the Panos Institute included their name, logo and contact details on the back cover of their report "Beyond our means?", 2000, along with a summary of the contents.



What is a policy report?

INFORMATION CARD

A policy report is a documentation and communication product that provides a written account of an organisation's experiences, lessons, opinions, and recommendations about a selected subject.

A policy report:

- ✓ Is a tool to communicate specific messages and arguments about an issue or area of work – sharing what an organisation has done and learned to date, and what it thinks it or others should do in future.
- ✓ Is primarily for external audiences (such as donors and government policy-makers), but can also be useful reference materials for internal ones.
- ✓ Requires an authoritative style – making strong arguments and backing them up with concrete facts and examples.
- ✓ Can vary widely in format, but should be concise – usually not more than 20 pages long.

Key questions

Key questions to ask *before* developing a policy report are:

- ? Is what you have to say about the subject special, important and convincing enough to justify producing a policy report?
- ? Is there a market for your policy report? Will enough of the right type of people want to read it and use it? Is it worth your NGO's/CBO's time, money and effort?
- ? Who should write the policy report? For example, should it be written by an "expert" on the subject, or by someone who is a strong writer?

Structure and content

These pages show an example of a structure and content outline for a policy report about an NGO/CBO involving people living with HIV/AIDS (PLHA) in HIV prevention. The outline shows what the product will contain and in what order. The boxes around it provide some key “dos and don’ts” about how to make a policy report as effective as possible.

DO include an Executive Summary, but do not include points that are not in the main text. Be aware that, with a policy audience, this may be all that many people will read – so ensure that it gives a good summary of your key points.

DO keep your lessons and conclusions related to what you have discussed. Ensure that they reflect on your weaknesses as well as your strengths.

DO draft an outline of the contents and check it with everyone involved before you start writing the report. Include:

- Title page.
- Executive summary.
- Introduction.
- Results and discussion.
- Conclusions.
- Recommendations.

List of abbreviations

Executive summary

Introduction

- Overview of the NGO/CBO and its work
- What does the involvement of PLHA mean?
- Why does the involvement of PLHA matter?

First key point:

Personal benefits of the involvement of PLHA

- Outline of main benefits – description and examples
- Relevant lessons learned and conclusions

Second key point:

Organisational benefits of the involvement of PLHA

- Outline of main benefits – description and examples
- Relevant lessons learned and conclusions

Third key point:

Community benefits of the involvement of PLHA

- Outline of main benefits – description and examples
- Relevant lessons learned and conclusions

Fourth key point:

Policy benefits of the involvement of PLHA

- Outline of main benefits – description and examples
- Relevant lessons learned and conclusions

Recommendations

- For NGOs/CBOs, community groups and PLHA
- For policy makers and donors

DON'T cover too much in the introduction, but do:

- Provide some context.
- Explain what you are going to discuss and what your key points are going to be.
- Credit those that supported the work.

DO focus on policy issues and avoid long descriptions of processes and technical details.

DO use information responsibly. For example do not:

- Use contradictory information – unless you explain it.
- Fill your report with irrelevant information just to make it longer.
- Use other people’s data without referencing it.
- Use photographs or quotations from people without getting their permission.

DO keep your recommendations:

- Focused on policy issues.
- Linked to your conclusions.
- Positive and diplomatic.
- Realistic, clear and concise.