Development Outreach and Communications

SURVIVAL MANUAL

Sixth Edition, April 2012

Development Outreach & Communications
Bureau for Legislative and Public Affairs

Contents

A Message on Development Outreach and Communications

USAID must communicate and tell its story. There is a duty to inform overseas audiences about "American aid" programs in their countries, as noted under the Foreign Assistance Act of 1961, section 641, as amended. Our Development Outreach and Communications (DOC) efforts fulfill this mandate. By building and maintaining Agency outreach and communications capacity, USAID aims to increase awareness about U.S. foreign assistance, sharing real stories of the individuals, families and communities helped by USAID programs around the world.

With approximately 150 Development Outreach and Communications specialists, or "DOCs," worldwide, the Agency has a network dedicated to meeting communication goals abroad. Every Mission should have a DOC or DOC team to actively implement the Mission's strategic communications plan and measure the results. In all cases, Missions are responsible for helping to inform local, host-country audiences about the Agency's efforts—showcasing the breadth of USAID activity. This Development Outreach and Communications Survival Manual, now in its sixth edition, provides standard guidance to DOCs and other Mission staff conducting outreach efforts to key audiences both locally and internationally.

As a living document, the Survival Manual is updated as needed with new guidance and best practices. In this edition, video production has been added in Chapter 15 so that Missions may better understand how to utilize the visual storytelling power of field-produced video to convey the importance and impacts of USAID's work. With the new Chapter 16, social media for development is discussed, and best-practices and straight-forward tactics are clearly explained. The last of the new chapters, Chapter 17, is a step-by-step set of instructions that should be followed to develop and write your Mission's Communications Plan. We have not removed Chapter 10, "Developing a Long-Term Communications Strategy," as much remains relevant, but Chapter 17 reflects the latest guidance. A new sample Performance Monitoring Plan appears in Chapter 14 as well as in the appendices (for easy reference). Additionally, the Illustrative Results Framework (from Chapter 17) and updated DOC position descriptions appear as appendices. Please use the Survival Manual to understand

USAID expectations and combine it with updated guidance, including the ADS.

Thank you to all who work on development communications to better tell the story of USAID and the successes of U.S. foreign assistance efforts. Good luck in your activities and please reach out to the D.C.-based DOC Team at LPADOCTeam@usaid.gov with any questions or to share in-country communications successes.

Development Outreach and Communications Team
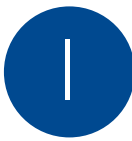**Bureau for Legislative and Public Affairs**

Chapter **1**

The Work of Development Outreach and Communications Officers (DOCs)

"Cooperation with the United States in the war on terrorism, in halting trafficking in weapons of mass destruction, in calming ethnic and religious rivalry, and in other destabilizing situations—as well as the ability of American citizens to safely and effectively conduct commerce everywhere in the world—now depends on international public support."

United States Advisory Commission on Public Diplomacy, 2004 Report

CREATING AN EFFECTIVE JOB TITLE

USAID's strength in delivering foreign assistance is in the field, where our Mission personnel work on the ground along with implementing partners and agencies. While an understanding of the United States' role in humanitarian relief and development assistance has always been somewhat limited among U.S. citizens, that understanding may be even more limited in the countries that USAID serves and among the men and women that USAID assists. However, under Section 641 of the Foreign Assistance Act (FAA) of 1961, we have a responsibility to inform host country audiences of the assistance provided by U.S. taxpayers. In fact, this section of the FAA provides our authorization for conducting public information campaigns.

In recent years, our Missions around the world have attempted to meet this obligation by hiring people to conduct public liaison and outreach activities. These individuals are referred to by a number of intriguing titles, including Public Information Officer, Program Information Specialist, and Outreach Specialist.

To bring greater consistency to our efforts, we will now refer to these individuals as Development Outreach and Communication Officers (DOCs). A model job description is included in this manual for assistance in identifying the skills most desirable in a DOC (see Appendix A). For the remainder of this manual, DOCs will be used to refer to those who handle media, public affairs, and outreach activities for USAID Missions.

> Under Section 641 of the Foreign Assistance Act (FAA) of 1961, we have a responsibility to inform host country audiences of the assistance provided by U.S. taxpayers.

THE ROLE OF DOCS

These individuals, working with the entire Mission staff, serve an important role in each of our USAID Missions worldwide. From developing, producing, and disseminating information about the Mission's activities to helping organize VIP visits to projects, DOCs' primary role is to act as a one-stop resource that can provide concise and appropriate information regarding USAID's work and the impact of that work on the citizens it affects. These individuals also collaborate and cooperate closely with the Embassy's Public Affairs Section to maximize exposure and understanding of U.S. humanitarian and development assistance efforts and initiatives.

DOCs should ideally have a two-dimensional job—one that requires proactive tasks (like researching program successes and results to shape the public's perception of USAID's role in overall U.S. government assistance) as well as reactive tasks (like responding to day-to-day media inquiries and requests for information). The degree to which these areas are balanced is dictated by the pace of activity at each Mission and the local media environment. DOCs also play a valuable role in helping Mission staff understand how the host country's local audience perceives its programs. This can be done by analyzing newspaper clippings, monitoring television or radio broadcasts, and obtaining and analyzing public opinion polls conducted locally. In addition, U.S. Embassies typically commission public opinion polling, and it may be possible for USAID to add one or two questions to such polls. Efforts should be made to ensure that Mission staff are briefed on Embassy polling activities; this can be coordinated with the Embassy public affairs section. In addition to Embassy commissioned polls, several implementers may also conduct polling relevant to their programs. (Implementers are agencies funded by USAID that carry out USAID programs.) These findings can be particularly useful not only to the relevant Cognizant Technical Officer (CTO)—the person responsible for the technical oversight and administration of the activity—but also to a wider USAID internal audience, such as program staff, because the findings often illustrate local perceptions and may contain information about how people obtain news.

Clearly, DOCs cannot do this job alone, nor can they create good news from a program that is not functioning well. The cooperation of Mission staff and effective two-way dialogue between Mission staff and DOCs are critical to ensuring that DOCs understand programs and initiatives well enough to translate them into everyday language that audiences can understand. Every effort should be made to avoid wordy or technical USAID language when describing our activities.

TIP:
Avoid wordy or technical USAID language when describing our activities.

DOC OUTREACH ACTIVITIES

While DOCs may wear many hats, here are just a few of the outreach functions they perform:

● In coordination with the Embassy Public Affairs Officer (PAO), respond to inquiries from the general public and the media about USAID programs

● Collaborate with the Embassy PAO on long-term strategies and/or events

● Initiate and coordinate interviews with the Mission Director

● Advise the Mission on media relations and possible reaction to a proposed USAID activity

● Write speeches for the Mission Director and other personnel

● Set up special events, including VIP visits

● Provide stories to *FrontLines* and the Telling Our Story database

● Develop country specific USAID materials, including brochures and fact sheets

● Prepare news releases and other media material

● Establish and maintain contact with donor and other U.S. government agency representatives

● Coordinate website updates

To determine the appropriate role of the DOC within a USAID Mission, the Mission must determine several issues. It must ask itself how proactive it wants to be and what resources—including funding—will be devoted to public outreach and media activities. Missions approach funding for public affairs and outreach in various ways—from designating a specific amount of operating expenses (the infamous OE Account) or program funds to having a specific percentage set aside within each contract. The Mission will also have to determine how much access to information will be afforded to the DOC in order to get the job done effectively.

THE IMPORTANCE OF USAID/EMBASSY COORDINATION

Finally, the Mission must assess the relationship with the U.S. Embassy Public Affairs Section to set up areas of responsibilities and clear lines of authority. As noted in the DOC job description, DOCs must collaborate closely with the PAO or Information Officer (IO) in the Embassy to ensure an overall understanding of humanitarian and development assistance. Often the Embassy

DOCs must collaborate closely with the PAO or Information Officer (IO) in the Embassy to ensure an overall understanding of humanitarian and development assistance.

will ask to clear all USAID-issued news releases or statements. Most Missions also set up a protocol for responding to media requests for information. These lines of authority and cooperation are critical for seamless U.S. government communications.

As noted above, although there are no specific rules governing this relationship, Section 641 of the Foreign Assistance Act (FAA) of 1961 provides that USAID will inform host country audiences of the assistance it provides. This section of the FAA provides our "authorization" for conducting public information campaigns. It also focuses our efforts on activities that inform host countries' audiences about specific USAID activities and the scope of those activities.

Chapter **2**

USAID/Washington, D.C. Public Affairs Overview

THE ORGANIZATION OF THE PRESS OFFICE

The Press Office within the Bureau for Legislative and Public Affairs (LPA) is unique at USAID. The men and women who comprise the staff are employees of the State Department assigned to full-time duty at the USAID building in Washington, D.C., and thus wear dual hats in terms of preparing information and coordinating messages. The USAID Press Director sits in on regular Public Affairs Directors meetings at the State Department to share information about USAID's activities. In addition, the press staff participates in the morning conference call overseen by the Assistant Secretary of State for Public Affairs. During this call the day's activities, main news stories, message of the day, and important announcements are shared with the Press Officers and Public Affairs Directors.

In addition to responding to numerous media inquiries, Press Officers prepare news releases, fact sheets, program one-pagers, Letters to the Editor, and talking points. They work closely with the Administrator and Bureau senior staff to set up and prepare for media interviews and media roundtables. They also set up news conferences and media events, as well as travel overseas with Agency senior staff to coordinate media coverage. Press Officers are assigned to one or more regional or functional Bureaus to coordinate media activities. They work closely with Bureau communications professionals to generate story ideas and media placement.

The USAID Press Director is also USAID's spokesperson and is authorized to speak on behalf of USAID on all USAID topics. He or she works closely with the Administrator to ensure that messages are consistent and coordinated with the State Department. The Press Director, or a designated Press Officer, also briefs the Administrator or designee on the news of the day at an early morning press briefing.

> Press Officers in USAID/Washington are assigned to one or more regional or functional Bureaus to coordinate media activities.

PREPARATION OF PRESS GUIDANCE

One of the main duties of the USAID press staff is helping to prepare daily press guidance. Daily press guidance is used primarily by the State Department spokesperson at the daily media briefing in Washington, D.C. The White House and other relevant federal agencies may also use it. Daily press guidance is tasked, or assigned, each morning by the State Department Press Office depending on the news of the day. The USAID Press Office is often tasked with preparing guidance related to USAID's humanitarian efforts, disaster response, and development activities. The USAID Press Office must ensure that USAID personnel provide the proper clearances and coordinate both among internal USAID offices and with other State Department offices. Cleared press guidances must be e-mailed or faxed to the State Department Press Office no later than 11:30 a.m.

Cleared press guidance is a set of internal talking points that represent USAID's official position on the subject press guidance. *It is not to be used or distributed externally or e-mailed or faxed to journalists.*

Cleared press guidances prepared by USAID can be found at http://inside.usaid.gov/LPA/guide.html. An example of a cleared press guidance can be found in Appendix A.

All press guidances can be found at http://mru.pa.state.gov/pd/guidance.nsf. A user name and password is required for this site. You can obtain both by e-mailing the Media Resource Unit at the State Department's Bureau of Public Affairs at pamedia@pd.state.gov.

PRESS DUTY OFFICERS

The USAID press office has normal operating hours from 8 a.m. to 6 p.m. Monday through Friday. The office is closed for federal holidays and on weekends. However, a Press Duty Officer is available after hours, on weekends, and on federal holidays to handle media inquiries. The Duty Officer can be reached by calling USAID/Washington, D.C., at (202) 712-4320. An after-hours recording will provide the name and cell phone number of the Duty Officer.

In addition, general USAID Duty Officers can be obtained 24 hours a day by calling the State Operations Center at (202) 647-1512.

USAID NEWS OF THE DAY

The USAID press office compiles news clippings relevant to USAID's activities each morning at headquarters. These are posted on the USAID intranet under

> The USAID Press Office is often tasked with preparing guidance related to USAID's humanitarian efforts, disaster response, and development activities.

Daily Clips. Generally, the office compiles these using the news compilation capabilities of the State Department. However, particularly significant news (in English) from the field can be sent to the Press Office for inclusion.

STRATEGIC COMMUNICATIONS AND PUBLICATIONS DIVISION

LPA/SCP works closely with the Administrator and senior staff to develop and communicate USAID's mission, vision, positioning, and messaging. Its duties include:

● Developing the LPA Bureau's public affairs strategy, as well as USAID's communications policies and procedures

● Developing and executing USAID's crisis communications plan

● Serving as the primary liaison with the Policy and Program Coordination (PPC) Bureau, translating strategies and priorities into communications campaigns and products

● Working with PPC to develop the publication policy and strategy and ensuring both a presence and impact at major development conferences

● Maintaining employee communications and the production of USAID's publication *FrontLines*

● Identifying and supporting marketing and sponsorship opportunities, producing promotional materials, and maintaining USAID's database and mailing lists

● Contracting photographers and maintaining the USAID photo library

PUBLIC LIAISON DIVISION

LPA/PL develops and implements USAID's outreach strategies and educational programs targeted toward key U.S. audiences and constituency groups. In addition, this Division implements selected public diplomacy efforts both domestically and overseas. For example, in the aftermath of 9/11, the Division enhanced public diplomacy efforts specifically targeted toward the Arab and Muslim world. Those efforts included the hiring of a Muslim Outreach Officer and a Middle East Partnership Initiative Officer to implement public diplomacy efforts. An overall description of LPA/PL's duties includes:

● Having its public affairs specialists, who work closely with regional and functional Bureaus' leadership teams, identify and manage communications opportunities and issues

● Making recommendations to the Administrator and senior officers for participation at events

LPA/SCP works closely with the Administrator and senior staff to develop and communicate USAID's mission, vision, positioning, and messaging.

● Managing the USAID speakers' bureau to increase interface with key constituencies

● Creating opportunities to deliver USAID's messages by sponsoring events and forums that promote initiatives and success stories

● Managing domestic outreach programs, including Operation Day's Work, a USAID-sponsored national student initiative; and the Development Education program, which facilitates public review of the political, economic, technical, and social factors related to hunger, poverty, economic growth, and development.

● Maintaining a calendar of key events

● Monitoring public opinion regarding foreign assistance and international development

PUBLIC INFORMATION, PRODUCTION, AND ON-LINE SERVICES DIVISION

LPA/PIPOS helps USAID tell the Agency's story. It serves as the primary interface with individual Americans and as the Bureau's production house. Its duties include:

● Housing USAID's customer service representatives, who respond (via phone, mail, and e-mail) to public inquiries and Freedom of Information Act (FOIA) requests

● Developing the online strategy and e-marketing tools and products

● Driving the function and content of the external website

● Setting the policies associated with posting material on the web

● Hiring crews, producing videos, and maintaining USAID's library of video footage

● Supervising video-conferencing services

● Maintaining a graphic design and production capacity

● Producing exhibits that promote recent work in the developing world

● Maintaining the USAID Information Center, a facility open to the public that showcases a permanent exhibit explaining USAID's history and accomplishments. (The Information Center includes the press briefing room and public conference space.)

● Producing USAID events as well as promotional materials

LPA/PIPOS sets the policies associated with posting material on the web.

● Developing and managing branded merchandise (banners, posters, pins and pens, etc.)

BUREAU COMMUNICATIONS PROFESSIONALS

As noted previously, each Bureau also has designated communications professionals who work exclusively on Bureau-related events and publications. Their duties include the following:

● Working closely with Missions to generate success stories

● Acting as the main point of contact for *FrontLines*

● Coordinating the production of content for the USAID external website

● Working with LPA during the planning and production of outreach activities and events

● Serving as the liaison with press officers to generate story ideas and placement strategies for U.S.-based publications (although communications professionals do not deal directly with the news media)

Each Bureau also has designated communications professionals who work exclusively on bureau-related events and publications.

Chapter **3**

Coordinating Mission Outreach Activities with Washington, D.C.

INTERNAL COMMUNICATION

Cooperation and open dialogue are the keys to smooth, seamless internal communications—with the regional and functional Bureaus, the Administrator's Office (A/AID), and the Bureau for Legislative and Public Affairs (LPA). There are a number of established channels for coordinating information and activities with Washington, D.C. Those include the following:

MEDIA REQUESTS

The main point of contact for dealing with media requests is the LPA Press Office. Individual press officers are assigned to deal with respective bureaus and handle media requests on relevant topics. All interview requests for Bureau personnel, including the Assistant Administrator, are coordinated through the Press Office. Interview requests for field-based Mission staff that are received and reviewed in Washington, D.C., are transferred to the appropriate Mission-based DOC. The LPA Press Office also sets up all interviews for the Administrator; responds to daily press calls; drafts and edits press releases, fact sheets, and one-pagers; plans media events; and sets up media roundtables and news conferences.

Mission Directors and other senior Mission personnel should use the LPA press officers in Washington, D.C., as a resource when they return to the United States. These press officers can set up media interviews, roundtables, and other press opportunities with advance notice. Similarly, legislative officers are available to assist with visits to Capitol Hill. All of these activities can be arranged by maintaining regular contact between the DOCs and their counterparts in Washington, D.C.

While it is not necessary for every local media request received by a Mission to be brought to the attention of the Press Office, it is required when international media requests are made (CNN or *The Washington Post*, for example) or when

> All interview requests for Bureau personnel, including the Assistant Administrator, are coordinated through the Press Office.

high profile or very large-scale activities are to be made public. This will help ensure that USAID provides consistent information in the field and at headquarters and that a published story catches no one off guard. In addition, this coordination helps to expand the successful placement of news around the world.

Press Officers should be consulted when considering a media request for an interview or supplying information to publications like *The New York Times.* Conversely, Press Officers make every attempt to provide our Missions relevant information and U.S. media stories.

BUREAU COMMUNICATIONS COORDINATORS/ADVISORS

As noted previously, each of the Bureaus has one or more dedicated communications professionals, who focus on specialized outreach and communications activities. These individuals may be assisted by bureau contractors who also work on communications issues. They are primary points of contact for DOCs within the Bureaus. These individuals work closely with LPA to ensure that activities are coordinated appropriately. Bureau outreach personnel do not deal directly with the media; however, they may help to coordinate responses with the LPA Press Office. Misson-based DOCs should be familiar with their press office counterparts at headquarters, as well as these Bureau communications coordinators.

Bureau communications advisors are also the contact points for *FrontLines* and Telling Our Story. They also work with LPA to strategize on stories, ensure that all portions of Bureau activities are represented, obtain Bureau clearances, and collaborate with Missions on individual submissions.

Bureau outreach efforts include targeted special events to external audiences, publications development and dissemination, website design and development, research support, and responses to information requests. Bureau outreach staff seek to communicate USAID's programs and accomplishments in the field; therefore, coordination and cooperation among the field, regional Bureaus, and LPA is critical to ensuring that USAID's story is told, and told well.

Chapter **4**

Working with the Media Effectively

PROACTIVE AND REACTIVE MEDIA RELATIONS

There are generally two ways of working with the media. The first is by responding to media inquiries for information and/or interviews with Mission personnel. The second is by proactively scheduling interviews, site visits, and other media events to bring visibility to a project or announce the start or completion of a project or program. Ideally, even the smallest Mission will look for proactive ways to showcase the U.S. government's commitment to advancing economic and social welfare by (1) educating the local audience about U.S. assistance, (2) highlighting the successes and achievements of USAID projects in the community, (3) showcasing the men and women who benefit from U.S. programs, and (4) marking significant milestones in USAID local projects.

In larger media or press offices, these roles will be split between two people, as is the case in many government offices and private corporations. The press secretary focuses on putting out day-to-day "fires" and responding to media inquiries, while a communications director focuses on long-term strategic issues, such as how to reach target audiences and craft effective messages. The USAID/Washington Bureau for Legislative and Public Affairs is organized this way: It has a Press Director assisted by several Press Officers, as well as a Strategic Communications Chief aided by several staff assistants. Both of these individuals' activities are managed by the Deputy Assistant Administrator for Public Affairs.

In some cases, one person may have to handle both the reactive and proactive responsibilities. In these instances, the key to creating a proper balance is planning, which means creating a communication strategy. This document sets long-term goals and objectives, identifies target audiences, and determines the most effective methods and mediums to reach the local audience. It also more

> Ideally, even the smallest Mission will look for proactive ways to showcase the U.S. government's commitment to advancing economic and social welfare.

clearly defines coordination with partners and implementers, as well as coordination with other aid agencies and the U.S. Embassy. The development of effective communication strategies is covered in Chapter 10.

USAID DOCs may get numerous media inquiries from local media for information about USAID, depending on the size and strategic importance of the Mission. In general, the rules and procedures for coordinating these inquiries with the Embassy PAO have been set up informally from country to country and are agreed to by the Mission Director and Ambassador. However, in all Missions common sense dictates that DOCs use their best judgment to bring sensitive issues to the attention of the Embassy and the USAID/W Press Office before these issues become news. Moreover, Mission DOCs should only respond to requests for information regarding USAID's humanitarian assistance and development projects; all requests related to U.S. foreign policy and bilateral relations must be referred to the U.S. Embassy. *DOCs should never attempt to comment on these issues.*

Many DOCs effectively set up media roundtables, organize project media tours to speak directly with project beneficiaries, and help familiarize local journalists with the important work of USAID. It is imperative that they make every effort to take these proactive steps designed to broaden international understanding of U.S. assistance. By keeping the Embassy Public Affairs Section informed about these activities (and ideally producing and disseminating a monthly events calendar), duplication and bureaucratic issues will be kept to a minimum.

Chapter 559 of the Automated Directives System (ADS), which is a series of rules and policies governing USAID, states that "all media inquiries whether overseas or in D.C. shall be referred immediately to LPA/PR (press office)." Given time zones and deadlines, this may not always be a feasible option. However, at a minimum every attempt should be made to coordinate and inform a Press Officer either by telephone or e-mail. USAID consistency is the desired result. DOCs must weigh the need for urgency with the sensitivity of the issue and determine if it is something that should be referred to Washington, D.C. However, since the Washington, D.C. Press Office is responsible for direct contact with American-based news media, all inquiries from U.S.-based press must be coordinated with the D.C. office.

Given the USAID/State relationship, as well as the need for message consistency for host country audiences, DOCs should work with the Embassy and the Mission Director to set up ground rules for who is authorized to speak to the press on behalf of the Mission. Typically, this will only be the Mission Director and a designated DOC. Even, for example, when Mission personnel who are most familiar with a specific project participate in a site visit with local journalists, they're permitted to provide background information only; they are not authorized to be quoted by name on behalf of USAID.

PREPARING FOR THE MEDIA INTERVIEW

Preparation is the key to a successful media interview. DOCs need to decide what they want to achieve during the interview and who the target audience is. For instance, the Mission may decide that it needs to more effectively communicate about a health initiative that is targeted to urban women. In that case, the best tactic to reach that audience may be local radio and a specific program with female listeners.

Knowing your goals and audience before beginning the interview helps in developing the message and ensuring that you reach your communication goals. Typically, no more than three main messages should be prepared in advance. These should be repeated throughout the interview in concise, easy-to-understand language for the listener, viewer, or reader. DOCs should work with the Mission Director or individual being interviewed to develop these messages and help ensure that any confusing and burdensome programmatic language is translated into everyday language.

Other factors to take into consideration when setting up or granting an interview include the following:

● What prompted the interview request?

● Who will conduct the interview? What is the experience of this journalist? Is he or she a seasoned journalist or new to the profession?

● What other types of articles/news stories has he/she written or produced?

● How much time do you have available for the interview?

● When will the article be published or the interview air? (Make proper arrangements to tape and/or for a clip.)

● Who else is being interviewed for the story?

● Are there individuals you can suggest to the journalist who are knowledgeable about the subject matter?

● Has the reporter covered this subject before, or is he or she new to the topic?

● Is this a feature article or a short news article?

● Will they include photos in the story?

● If it is a television interview, what will the backdrop be?

● If it is a television interview, will it be broadcast in its entirety or will it be edited?

> Knowing your goals and audience before beginning an interview helps in developing the message and ensuring that you reach your communication goals.

● What is the overall length of the television segment?

● If it is a radio interview, is it live or taped? Will there be call-ins?

● If there are other guests, what is the line up? What are their views on the subject?

Thinking about these questions in advance of the interview and ensuring that the Mission Director has the most comprehensive information about the topic available will help to ensure a more successful interview.

GRANTING MISSION DIRECTOR INTERVIEWS

Generally, ground rules should be established before the Mission Director or any Mission personnel speak to local media. The ground rules that are used by American media are as follow and may serve as a useful guide before the interview starts:

On the record: Information is quoted directly and attributable to the principal by name and title (Example: Andrew S. Natsios, Administrator, U.S. Agency for International Development)

On background: Information may be used for the story either as a direct quote or paraphrased. The individual is not noted by name, but rather as a USAID official.

On deep background: The source is not quoted or identified, but the information conveyed to the reporter is used to help gain a better understanding of the issue or subject. The information is usually presented as "it is understood that" or "it has been learned."

Off the record: This rule is most often used for the reporter's background knowledge of the subject matter. No information provided may be used in the story.

Source: Survival Manual for Public Affairs Advisors, U.S. Department of State, April 2003

Time limitations should also be established up front so that the interviewer has a clear idea of exactly how much time he or she has to ask the questions. If additional ground rules need to be determined—for example, if there are subjects that will not be covered in the interview—these should also be agreed upon before the interview takes place. DOCs should also determine if the interview would be better arranged face-to-face or if a phone interview is the more appropriate format. Typically, a face-to-face interview is more effective since body language and local language proficiency are important factors in conveying the message.

TIP:
Generally, ground rules should be established before the Mission Director or any Mission personnel speak to local media.

On-the-record and background interviews are normally recorded by the DOC or Press Officer for archive purposes and to check the accuracy of reporting. If it is necessary to correct information in the article or report, these recordings are invaluable.

MEDIA RELATIONS AND USAID IMPLEMENTERS

USAID contracts and grants include specific instructions regarding media interaction and communication products, including brochures and annual reports. Because implementers may request Embassy or Mission participation in a ribbon cutting or other event, several Missions have prepared guidelines for media relations which are distributed to and discussed with implementers. A sample media guideline is attached in Appendix A.

These guidelines cover not only rules and procedures for dealing with media requests, but also detailed instructions for requesting official USAID participation, as well as guidelines and deadlines for preparing event products, including talking points, scene setters (logistics coordination), and press releases.

DOs AND DON'Ts FOR MEDIA RELATIONS

Adapted from the Field Operations Guide for Disaster Assistance and Response, 2004

● Be prepared: Know as much about the journalist's style of writing or reporting as you can before going into the interview.

● Develop talking points before the interview so that you can repeat your main messages and get across the key points. Being concise and to the point will help to ensure that you are quoted as you would like to be.

● Set the ground rules beforehand:

> Agree to the length and format of the interview.

> Agree on whether the comments will be on-the-record, on background, on deep background, or off the record (refer to page 4.4). You can't agree to these terms after the interview has already occurred, so do this up front.

● Never pick a fight with the news media: They air or print everyday and you don't.

● There are no secrets: Assume what you say and do will get on the air or the printed page.

● Although you can say things off the record, that doesn't mean the media won't print them and attribute them to you.

TIP:
Develop talking points before the interview so that you can repeat your main messages and get across the key points.

● Don't assume anything: Reporters may not be well informed or technically proficient about your profession.

● Explain terms to ensure they are understood.

● Keep it simple: Simplify and summarize your major points.

● When appropriate, write facts and data down to hand out.

● Use plain language. Avoid acronyms. Talk in a relaxed style that is aimed at a lay audience, not subject experts. Remember that the audience is the general public.

● Give reporters a good story to write, or they may find one you don't like and write that one instead.

● Listen for trends in the questions. Is the reporter asking leading questions? Are there obvious misconceptions? Offer to clarify or redirect.

● Do your homework. Conduct research on the reporter and other stories that he or she has written. Try to determine his or her angle or frame of reference.

● Understand that the media seeks truth but will settle for balance. Ask who else is being interviewed—an opposing view will likely be included.

● Treat reporters professionally and with respect.

● Always answer reporters' calls immediately. Leave word in your office of where you will be so you can answer calls immediately. Carry a cell phone if possible.

● Make relationships.

● Make sure your information is accurate. Remember, your comments don't have to be all encompassing.

● Don't lie and never speculate.

● If you don't know an answer, say so. Write down the question, get the answer, and get back to the reporter.

● Never stray from your area of specialization—humanitarian aid and development. For instance, don't answer questions about U.S. government relations with the host country or another nation. Let the proper agency, such as the State Department or Department of Defense, answer those questions.

● Before you do an interview, decide what you can discuss and what you can't—and stick to those decisions.

● Choose your words carefully and well. They will likely be reported as you say them.

● Repetition is the essence of retention. The public will remember what they see, hear, and read repeatedly in the media.

● Once a story you don't like is out, it is difficult to change public perception about it. However, always correct any wrong information *immediately*.

● Whenever possible, use objective and authoritative sources of information to back up your statements to reporters.

● Try to anticipate questions. If you can't and you're caught off guard, get back to the reporter so you can give a considered response.

● Even if the reporter does not ask the ideal questions, take advantage of the opportunity to explain what you consider to be the most important points and stick to your agreed-upon message. For instance, you can weave in how a particular program fits into the overall USAID strategy.

TIP:
Whenever possible, use objective and authoritative sources of information to back up your statements to reporters.

Chapter **5**

Don't Reinvent the Wheel: Online Resources and Tools

Excellent online resources—as well as valuable outreach platforms—can be accessed with just a click of the mouse. In the internet age, the vast number of websites and information pages may feel overwhelming—especially if you have a slow connection speed. For DOCs with little time or energy to explore many options, this chapter offers a shortlist of the most useful online resources and tools for DOC work at USAID Missions.

These websites can help you develop materials, build talking points, or brainstorm on techniques to reach traditional and non-traditional audiences. Sections break down between those that act as resources and those that can be used more strategically to expand a Mission's reach.

THE DOC TOOLBOX

These go-to online tools can help on a daily or weekly basis to understand USAID development outreach and communication needs and prepare for, implement, and evaluate outreach activities. Consider bookmarking these for easy access.

DOC Intranet Page: http://inside.usaid.gov/LPA/survival_manual/
This page provides information about USAID development outreach and communications and links you to many of the best resources for DOCs and USAID colleagues. It also contains information for new DOCs joining a Mission, in order to assist the Mission through periods of transition. Links include:

● Downloadable Survival Manual

● Mission Communication Strategy guidance

● Performance Monitoring for outreach tips

● General Counsel ruling on program fund use for outreach

● Writing tips for USAID Missions

● DOC e-newsletters

DOC Forum: http://communities.usaidallnet.gov/doc
Tried-and true DOC best practices, lessons learned, questions, and networking opportunities are available on this password-protected website. This DOC-only forum allows for downloads of materials and reference of tools used by fellow DOCs.

Event Planning: http://inside.usaid.gov/LPA/events/
This intranet page offers tips, guidance, and protocol guidelines for special events or VIP visits to your Mission. Templates are also available for event materials, such as place cards, speaker cards, and more.

Press Office Daily Clips: www.bulletinnews.com/usaid/
Keep yourself up to speed on what international media are saying about USAID and U.S. foreign assistance. Daily clips of USAID mentions in the media are compiled by USAID on a daily basis and are available by 9 a.m. U.S. EST.

USAID Branding and Marking Guidance: www.usaid.gov/branding/
Official branding and marking requirements and the USAID identity templates for download are available from this website. *Note*: All branding and marking regulations are available for public viewing so you may share this readily with implementing partners and interagency colleagues who inquire about USAID branding and marking standards.

● Use the *USAID Graphic Standards Manual* regularly to develop and design materials. Be sure to follow the standards for use of colors, designs, developing banners and signs, and more. www.usaid.gov/branding/gsm.html.

● ADS 320: Branding and Marking. The Agency regulations for DOC duties and the roles and responsibilities of others at Mission. The chapter also describes the necessary branding and marking standards for acquisition and assistance awards: www.usaid.gov/policy/ads/300/320.pdf.

For more information about branding and marking, read Chapter 9. Be aware of updates to these guidelines by regularly visiting www.usaid.gov.

USAID Budget Basics: www.usaid.gov/policy/budget
For DOCs who manage or hope to obtain an outreach budget, get to know USAID budget 101.

● Visit this site to get the most up-to-date information about the budget process: http://inside.usaid.gov/A/F/

Polling and Survey Work: www.opensource.gov

Some Missions may have the needed resources to conduct public opinion polls or surveys to assess a local audience's favorability to U.S. foreign assistance and USAID efforts. Others may need to partner with organizations to understand perceptions of foreign audiences. The above link refers to the State Department's Office of Research and Opinion Polls (INR), which conducts regular polling worldwide. You can ask INR about any research being conducted or completed in your region by emailing Research@state.gov. You may also see INR results searchable by date and by region of interest via Infocentral (see reference on page **5.4**).

Other sources of online information that can help you understand how your audience views foreign assistance or how they get their information include:

● Council on Foreign Relations: www.cfr.org

● Gallup World Poll Analyses: www.gallup.com/poll/worldpollchannels.aspx

● International Republican Institute: www.iri.org

● National Democratic Institute for International Affairs: www.ndi.org

● Pew Global Attitudes Project: www.pewglobal.org

● Terror Free Tomorrow: www.terrorfreetomorrow.org

● World Public Opinion: www.worldpublicopinion.org

TALKING POINTS & UPDATES

Stay informed on timely USG guidance, talking points, newsletters, and press briefings by visiting these sites often and signing up for relevant listservs. Use appropriate information for inclusion in your materials or for better understanding the issues that USAID/W addresses.

Daily Press Briefing by State Department: www.state.gov/r/pa/prs/dpb/
Read daily or archived transcripts of official press briefings by the State Department spokesperson that address issues of the day.

Infocentral: https://infocentral.state.gov
This State Department-hosted site allows for one-stop shopping on information and updates. It includes everything from daily news clips and talking points to event calendars and guidance organized by issue area and region for U.S. government spokespersons and Embassy officers. It is password protected so to sign up for access and email alerts, complete the registration form at the above address. The user log in is your official government email address.

● Public Diplomacy Briefing Book:
https://connect.infocentral.state.gov/travel_briefs/home/
The PD Briefing Book provides messaging, regional Q&A, global Q&A, and development stories organized by region. Access the book on the home page of Infocentral. You can also request membership to the PD Briefing Book listserv by contacting pdbriefingbook@state.gov.

Rapid Response: https://infocentral.state.gov/guidance/rapid-response2
In an effort to stay current on news cycles, the Rapid Response Unit of the State Department acts as a global media monitoring office that analyzes foreign media coverage of the U.S. Daily reports highlight media trends on hot issues and provide cleared and brief message points from State Department officials. Development issues in the news may be covered. Access Rapid Response daily reports at Infocentral or request to be on the listserv by emailing rru@state.gov.

USAID Speeches: http://www.usaid.gov/press/speeches/
The most recent Administrator and USG senior official speeches associated with foreign assistance are posted on these web pages. Keep aware of what speeches are taking place (both in Washington DC and abroad) to repeat message points.

USAID Listservs: http://www.usaid.gov/cgi-bin/listserv.cgi
Receive regular updates on timely topics related to program areas and/or regions by subscribing to the various listservs available at the above link. Listservs are available to the public unless otherwise noted.

ONLINE PUBLICATIONS & HELPFUL INFORMATION

The publications listed below help answer questions to frequently asked questions and are useful for reference.

FrontLines: www.usaid.gov/press/frontlines/
USAID's monthly news publication reports USAID stories from around the world—on programs, development issues, and employee happenings. The audience mainly includes USAID employees, as well as implementing partners, Congress, interagency colleagues, and news organizations. Sign up for *e-FrontLines* via the above link to receive *FrontLines* via email.

Global Partnerships: http://inside.usaid.gov/GDA/
Subscribe to the newsletter from the Global Development Alliance (GDA) to learn more about public-private partnerships worldwide. Talking points and more guidance on how to message USAID public-private partnerships are available on the intranet site.

● A worldwide, interactive map of USAID's public-private partnerships can be accessed on the external website and used for reference: www.usaid.gov/our_work/global_partnerships/gda/ (Requires Google Earth to be installed on your PC.)

A Responsible Press Office:
http://www.america.gov/publications/books.html#press
This booklet notes basic standards between the government and the press. Topics include press releases, media advisories and fact sheets, interviews, press conferences, crisis communications, and event planning. See Chapter 4 on "Working with the Media Effectively" for more USAID-specific information.

U.S. Department of State-USAID Strategic Plan, Fiscal Years 2007–2012: http://www.usaid.gov/policy/coordination/stratplan_fy07-12.html
The joint strategic plan details USAID and the State Department's shared mission.

USAID Development Experience Clearinghouse: http://dec.usaid.gov/
This serves as the virtual database for all Agency-funded technical and program-related documents. Search by program sector and/or by country.

TRAINING OPPORTUNITIES

There are various training opportunities available at USAID/W which you may wish to take advantage of throughout the year. Check through these websites to find those courses that are most suitable to develop your knowledge or skills, and then discuss your training options with your direct supervisor.

USAID University: http://inside.usaid.gov/M/HR/lsd/index.html
View up-to-date USAID course listings to find out if there are courses of interest for your work.

● Learning Management System: http://university.usaid.gov
Create your personal account for this web-based learning site by phoning ++866-948-6829. This provides you access to a library of training materials and registration for online courses.

GOOD SITES TO KNOW ABOUT

These websites offer you general information about USAID and its resources and tools.

F Website: www.state.gov/f
This is the official website for the Office of the Director of U.S. Foreign Assistance. Access fact sheets, budget information, and updates.

Knowledge Services Center: http://inside.usaid.gov/M/CIO/KM/KSC/

USAID's Knowledge Services Center is a resource for all library, research, and knowledge management activities within USAID. Access research tools, guides, and databases. You can also request country briefing packets, quick facts, or other research assistance.

USAID ADS Chapters www.usaid.gov/policy/ads/

Read and understand the 500 Series as well as ADS 320 to be aware of your DOC duties and responsibilities.

USAID Homepage: www.usaid.gov

As the online face of USAID, this site contains updated press releases, speeches, Telling Our Story examples, and other information, as well as useful links to Mission websites. It is updated daily, and timely topics are showcased.

REPURPOSING OUTREACH MATERIALS

Whether you work in a small or large USAID Mission, the Internet will help you to repurpose cleared information and reach wider audiences—both within USAID/W and worldwide. The links below are valuable for posting outreach products—written stories, photos, or videos—and to leverage your materials for greater use.

America.gov: www.America.gov

Hosted by the State Department, this site is America's "face to the world." The site houses a daily compilation of news articles and official texts intended to "tell America's story." A section focuses on U.S. development efforts.

● An Arabic version of America.gov is also available: www.america.gov/ar.

Development Calendar: http://apps1.info.usaid.gov/cgi-bin/webevent. pl?cmd=opencal&cal=cal1

Highlight notable events that are taking place in your country online at USAID's Development Calendar. This calendar, which is accessible from the main USAID website, contains information about USG, private-sector, and NGO events alike.

FrontLines: www.usaid.gov/press/frontlines/

Submit your article ideas and stories to the *FrontLines* editors through your regional bureau contacts or by emailing the staff directly at FrontLines@usaid.gov.

● Bureau contact information and writing tips from the *FrontLines* staff can be found at: http://inside.usaid.gov/LPA/survival_manual/.

Photo Gallery: www.usaid.gov/press/photos/

This serves as the Agency's official photo archive and is available to the public and media for download. All USAID projects should strive to submit strong images of beneficiaries and our field work for posting on this website. Implementing partners can submit directly but we suggest that partners inform the Mission DOC of submissions. DOCs can also search the galleries—organized by region, country, and program sector—to download images for use in their own materials.

● To submit, send one image per email to padams@usaid.gov in the Bureau for Legislative and Public Affairs (LPA). Include in the email:

• Organization name, photographer's name, location photograph taken (city, province, country), date photograph taken, names of individuals in the photograph, suggested title and caption of the photograph.

• Send the largest file size possible without changing or cropping the image.

Telling Our Story: www.usaid.gov/stories/

Submit program and beneficiary stories to the Telling Our Story website. These pieces, which include personal accounts and images of USAID's works worldwide through shortened stories, are posted on the main USAID website and regularly downloaded for inclusion in press kits, congressional briefing kits, and conference packets. Be sure to carefully follow the directions for each template available for use. Stories should be brief and closely related to a key milestone or success. For more tips on Telling Our Story submissions, see Chapter 7.

USAID Bureau Websites

Regional and pillar bureaus within USAID host internal websites and are always looking for news, and successes to highlight. (Please note: All websites are maintained by the Bureau contacts found via the DOC Intranet page.)

● Africa Bureau: http://inside.usaid.gov/AFR/

● Asia and the Middle East: http://inside.usaid.gov/ANE/

● Europe and Eurasia: http://inside.usaid.gov/EE/

● Latin America and the Caribbean: http://inside.usaid.gov/LAC/

● Democracy, Conflict, and Humanitarian Assistance: http://inside.usaid.gov/DCHA/

● Economic Growth, Agriculture, and Trade: http://inside.usaid.gov/EGAT/

● Global Health: http://ghintranet.usaid.gov/GH/index.aspx

Find actual USAID products for outreach, including hats, shirts, mugs, pens, and more at www.cafepress.com/usaid_online.

SOCIAL NETWORKING ONLINE: A TOOL?

USAID, like so many others, is exploring the online world of social networking to reach new audiences. Peruse these social networking sites regularly to understand if this sector offers viable outreach options.

YouTube: www.youtube.com/jafredericks

The Agency posts public service announcements related to its paid media campaigns and some YouTube interviews for viewing. See the public service announcements that have been included in major outreach efforts—which may include posters, events, as well as pre- and post-surveying—at various Missions.

Search Engines

Google, Yahoo, and other online search engines can be well utilized for USAID reports, press releases, and other materials. These materials must use the most common search words, however, in order to be found by everyday searchers. Therefore consider optimizing chances of USAID products being found by writing USAID in the heading of a press release or using the word farming instead of sustainable agriculture. Consider what kind of word you would use to describe a program to a friend and then consider if it is appropriate within the first two to three sentences of the USAID product.

Facebook: www.facebook.com

U.S. Agency for International Development is a group within the Facebook arena (www.facebook.com/group.php?gid=33776066288 or search for it by writing out the full Agency name). Some regional offices of USAID are exploring the use of Facebook groups for educating regional audiences about American efforts as well. Careful consideration of purpose and security (as well as privacy settings) should be given before your Mission seeks to join the Facebook community.

ONLINE REPORTS

Advisory Commission on Voluntary Foreign Assistance (ACVFA): Subcommittee on Public Outreach: www.usaid.gov/about_usaid/acvfa/
The ACVFA subcommittee on public outreach released a report in late 2008 on how USAID and the USG can better raise awareness of U.S. foreign assistance efforts, both domestically and internationally.

Advisory Commission on Public Diplomacy
For more than 60 years, the Advisory Commission on Public Diplomacy (ACPD) has worked as a bi-partisan, seven-member panel created by Congress and appointed by the President to "understand, inform, and influence foreign publics." In 2008, ACPD released "Getting the People Part Right": www.state.gov/r/adcompd/. Other annual reports can be found at: www.state.gov/r/adcompd/rls/c2449.htm.

General Accounting Office (GAO)
GAO has assessed USAID development outreach and communications efforts since 2004. Two of their reports are posted on the DOC intranet (http://inside.usaid.gov/LPA/survival_manual/) and on the GAO website.

—"U.S. Public Diplomacy: Actions Needed to Improve Strategic Use and Coordination of Research (July 2007): www.gao.gov/products/GAO-07-904

—"Foreign Assistance: Actions Needed to Better Assess the Impact of Agencies' Marking and Publicizing Efforts" (March 2007): www.gao.gov/products/GAO-07-277

HELP Commission
The Helping to Enhance the Livelihood of People Around the Globe (HELP) Commission was formed by legislation (Public Law 108-199) to study all U.S. foreign development assistance and provide actionable proposals to the President, Secretary of State, and Congress. The commission's 2008 report, "Beyond Assistance," can be read at: www.helpcommission.gov/.

Chapter **6**

Organizing In-Country Events without Losing Your Mind

SUCCESSFUL EVENT PLANNING

DOCs are often called upon to help organize public events, many of which will be covered by the media. As with all aspects of communications, planning ahead is key to success. Even if the Mission is not the primary event planner, if the event involves the public and/or media, DOCs should make every attempt to review the agenda with the organizers and "advance," or visit the location to review the numerous technical considerations. DOCs should also know what media may attend and anticipate potential questions to the Mission Director or USAID representative.

Several USAID Missions have prepared event checklists, which serve as useful guides for implementing partners and contractors and contain clear instructions and deadlines for coordination with the Mission. These guidelines are provided—as well as sample scene setters, press releases, media advisories, and backgrounders—so that implementing partners have a consistent format for submitting information to the Mission.

In organizing an event or agreeing to USAID official participation in an already organized event, be clear about your goal. Is it to educate the local audience about a particular project or activity, share information, persuade a particular target audience to participate in a USAID activity, correct misinformation, or reach a wider audience via the media coverage? Having a clear understanding of the purpose and goals for the event will help in developing the message.

Several USAID Missions have prepared event checklists, which serve as useful guides for implementing partners and contractors and contain clear instructions and deadlines for coordination with the Mission.

AN EVENT CHECKLIST

Next, develop a checklist of items needed. Given that DOCs normally operate on their own, it is likely that most of these coordinating details will be their responsibility. DOCs will work with the Program Officer, CTO, and Regional Security Officer (RSO) to coordinate many of these items. In the case of participation in an Embassy-organized event, DOCs may provide support to PAOs.

Here are a few of the event items that should be considered:

● Who is hosting the event?

● What is the duration of the event?

● What are the security arrangements and how might this affect the event? (This would be coordinated with the RSO.)

● Is it possible to review the room size, location, and other logistical issues in advance?

● What is the backdrop or the visual image that the reader or viewer will be left with? (It is helpful to think in terms of media coverage and what image you would like to be on the news or in a newspaper photo.)

● Is the USAID logo in the shot? If flags are posted, are they in the appropriate order of precedence?

● Are there program beneficiaries who can help in promoting the message by participating?

● Who is preparing the speech?

● What media will attend? What is the expected media coverage? What questions are the media likely to ask?

● How much time will the media be allotted to ask questions? Who will begin and cut off the questioning?

● Have appropriate media needs been addressed? Is there space or a riser for television cameras, for instance? Has the sound system been checked and have you prepared for a multbox?

● Do you have the proper press kits prepared?

● Is there a location or a press table for handing out information?

● Who will staff, or assist, the VIPs and ensure that they are familiar with the timeline?

TIP:
Determine if there are program beneficiaries who can help in promoting the message by participating.

● Are the appropriate VIP officials acknowledged in the speech?

● Have USAID Program Officers checked the facts?

● Which VIPs need special seating? Is there a holding room for VIPs? What is the order of precedence for official VIPs and dignitaries? Is there VIP parking?

● Who will open and close the event? Who is serving as master or mistress of ceremonies?

● Is there a podium or standing microphone for public speaking?

● If the speakers will be seated, what is the appropriate arrangement?

● What is the appropriate protocol for speaking?

● Who are the invited guests? How will they be seated?

● What are the transportation arrangements if you're visiting a program or project site?

● Who is developing the event plan and the sequence of events, or scene setter? Does all the appropriate staff have a copy of this schedule?

● Does the event plan and/or scene setter contain cell phone numbers so that if there is a problem, staff and key contacts can communicate?

● Are refreshments being served? Where and when? Are cultural, religious, and social customs and sensibilities being considered when preparing the menu?

● Are there arrangements for the necessary props (pens for a signing ceremony, for instance, or scissors for a ribbon cutting)?

● If the event is outside, is there a rain location?

● If appropriate, who will coordinate taping, transcribing, and/or translating?

● If appropriate, who will coordinate with the Mission and/or USAID/W web teams for proper posting of event pictures and speeches?

The list of items for consideration can be lengthy. However, DOCs who have organized an event from start to finish, particularly those involving members of Congress or other VIPs, know the importance of such meticulous planning.

THE PROTOCOL BASICS

These questions provide a comprehensive checklist to get you started in planning for a successful event. For specific answers to protocol questions such as proper placement of a USAID seal, visit the LPA Special Events and Protocol intranet site at http://inside.usaid.gov/LPA/events/.

> DOCs who have organized an event from start to finish, particularly those involving members of Congress or other VIPs, know the importance of such meticulous planning.

In 2005, the Director of Special Events and Protocol developed a one-stop resource for USAID protocol guidelines. Whether for a speech given by a Mission Director or a congressional delegation meeting, there are a number of protocol issues to consider, including the order of precedence for USAID principals and the proper placement of official flags and USAID banners. The protocol intranet site provides answers to some of the most common questions including the following:

Where should one place the U.S. flag when it is on foreign soil?

Answer: On foreign soil, the flag display should start from left to right with the specific host country's flag first. After the host country X flag, display other flags from left to right in alphabetical order based on the local language. (Remember: Foreign soil does not include U.S. Embassy grounds.)

Where does the USAID flag go in the lineup?

Answer: Immediately to the right of the U.S. flag or, when numerous countries are involved, to the right of the last country flag.

In addition to frequently asked questions, precedence lists, and etiquette tips, the site provides useful branded templates for easy event planning:

- Place cards
- Tent cards
- Invitations
- Event programs
- Menu cards

In many cases, you must consider both standard U.S. government procedures and the host country's cultural practices. Refer your questions on best cultural practices to the U.S. Embassy's Protocol Officer.

KEEPING USAID IN THE PICTURE

Every USAID-sponsored event should include USAID-appropriate items. Please be sure you have a complete supply of banners, large and small flags, stickers, pins, and hats. Generally, the Mission should maintain a supply of USAID products for at least one event per month, plus a small stockpile in case of a crisis in country (see more on crisis communication planning on page 10.4).

Local vendors are often preferred for producing USAID signs. When you work with a local vendor to produce these items, confirm that they adhere to the standard dimensions for banners and seals listed on http://inside.usaid.gov/LPA/events/ (under Resources), the Graphic Standards Manual, or www.usaid.gov/branding/downloadsprint.html.

If you are unable to obtain the necessary standards in your region, refer to these U.S.-based sources for the following items:

USAID banners and seals

The U.S.-based vendor listed at http://inside.usaid.gov/LPA/events/ supplies podium signs, three sizes of banners, table skirts, and round USAID seals.

USAID stickers and pins

Suppliers of USAID stickers and pins can be found at www.usaid.gov/branding/suppliers.html. Stickers are available in six different sizes and include both horizontal and vertical logos. Rectangular and round logo pins are also available.

USAID hats, pens, and other items

Updated vendor information for purchasing USAID merchandise including hats, pens, cups, and clothing can be found at http://inside.usaid.gov/LPA/catalog/.

TIP:
Keep at least a month's worth of USAID—branded materials on hand.

Chapter **7**

The Telling Our Story Initiative

THE HUMAN FACE OF USAID

USAID's Telling Our Story initiative is designed to help Missions better communicate their successes through storytelling. The Telling Our Story system provides simple, clear, standardized formats that effectively communicate success by focusing on how USAID has benefited a person, community, or country. Using the Telling Our Story formats, you can demonstrate firsthand USAID's programs in action and put a human face on these efforts. The stories are available to download via a searchable online archive at http://stories.usaid.gov.

The Telling Our Story initiative is not just an excellent tool to reach a broad audience through the USAID website. Its uses and distribution can go far beyond the Internet medium. For instance, DOCs may reprint these stories in the local media, use them for information packets, and circulate them within the Mission to generate interest in other programs and partners. They can also be used as anecdotes in speeches given by the Mission Director. And prior to country visits, journalists often scan the Telling Our Story website to gather information for story ideas.

Because the system is relatively new, improvements are constantly being made to make it more user friendly. We welcome comments about the system.

To get started, follow these simple steps:

1. Go to the Telling Our Story website at http://stories.usaid.gov.

2. Find the "Submit a Story" section on the right side of the page.

3. Review the Telling Our Story formats and choose one that works best for your story by clicking on the appropriate template link:
- Success Story
- Case Study

TIP:
Telling Our Story articles may be reprinted in the local media, used for information packets, and circulated within the Mission to generate interest in other programs and partners.

The Telling Our Story system provides simple, clear, standardized formats that effectively communicate success by focusing on how USAID has benefited a person, community, or country.

- First Person
- Before and After
- Photo and Caption

4. Draft your story according to the template guidelines. Please follow the guides carefully in writing your story. Then cut and paste the content into the appropriate fields in the story submission form. The story must also include a color picture (usually an image of an individual or group of individuals benefiting from the activity) that highlights the text. When you have finished inputting the information, click "Submit."

5. Once submitted, e-mail the Telling Our Story (TOS) Project Officer at tosinquiries@usaid.gov, and let them know that a story has been submitted and the title of that story.

6. After editing, the TOS Project Officer will e-mail a draft of your story to you for your comments and Mission clearance. Send your comments and edits back via e-mail or as a Word document attachment.

7. Clear the final draft with your advisor.

8. Send the final cleared version to the TOS Project Officer.

9. Keep a record of the clearances.

10. Contact the TOS Project Officer at (202) 712-1366 with any questions. You should expect your draft back from USAID/W within 10 days of submission.

FREQUENTLY ASKED QUESTIONS

How will the Missions benefit from the Telling Our Story initiative?
The Telling Our Story initiative gives Missions the opportunity to add impact to their communications, document successes using story-telling techniques and tools, and share these stories with a global audience. USAID/W has created a web-based tool and is providing additional resources and support for using standard formats to raise the visibility of Mission programs. In addition, USAID will have access to a bank of all success stories in a standardized format accessible online.

What are the options for the Telling Our Story formats?
The Telling Our Story system provides simple, clear, standardized formats that effectively communicate success by focusing on how USAID has benefited a person, community, or country. The Telling Our Story formats—including Success Story, Case Study, First Person, Photo and Caption, and Before and After—are easy tools for quickly producing ready-to-use, multi-purpose communications products.

How can Missions use these success stories?

Missions can use the formatted stories for multiple communications needs, such as speech writing, newsletters, media interviews, and public outreach. In addition, the formatted stories are an excellent way to document the Mission's rich history for years to come. The Telling Our Story team will provide guidance for using the stories in the field and will keep Missions updated on how the stories are being used by USAID in Washington, D.C., as well as by Missions worldwide.

How can I learn more about the projects featured on the Telling Our Story site?

Please contact Telling Our Story at tosinquiries@usaid.gov. The TOS Project Officer will put you in contact with the appropriate USAID staff and partners for further information and to share best practices.

Will this type of documentation replace the current system and databases USAID employs, or will it just be added on?

Missions may choose to use the Telling Our Story tools as a replacement for their current system. The Telling Our Story initiative has been developed to make writing stories easier and less time-consuming. The formats will help Missions improve how they document successes and will be another tool they can use in their outreach efforts.

In addition, the Telling Our Story initiative is replacing the old "Success Story" submission in the annual PPC-led APR data collection process. The Telling Our Story database will not replace other success story databases used by USAID. Existing success stories will be converted into the Telling Our Story formats as communications products and made available in an online searchable database.

How can our Mission learn the Telling Our Story system?

The Telling Our Story system is designed as a user friendly system that will help in documenting Mission successes. For access to the tools, visit the Telling Our Story website at http://stories.usaid.gov. In addition, the Telling Our Story team is available to provide online help and assistance with using the tools from Washington, D.C.

How do I get started using these tools?

Getting started is easy: Go to http://stories.usaid.gov. Choose the preferred story format to communicate or document your story. Make sure the content is cleared before submitting to Washington, D.C. Complete the easy-to-use story submission form using the online help and guides. If you have any questions about using the system, contact the TOS Project Officer at tosinquiries@usaid.gov.

TIP:
Complete the easy-to-use story submission form using the online help and guides.

How should I draft my story using the Telling Our Story formats?

First, choose a format in which you would like to write your story. Then review the components of the story in the submit form. Instead of entering your draft text initially into the Telling Our Story online submit form, you may prefer to create the content as a draft using a text editor, such as MS Word. Once the content has been approved and finalized by your Mission, return to the Telling Our Story system's online submission form. Cut and paste the information from the text document into the online submission form within the appropriate sections. Click on the "Submit" button to send the story to the Telling Our Story database.

Is there an expiration date for entries or are they kept indefinitely?

The Telling Our Story submissions are kept indefinitely and are accessible by all Mission personnel, USAID/W, and the general public via USAID's website at http://stories.usaid.gov.

Is there an easy way for the Missions to incorporate the story formats into their websites?

Yes. Missions can link their stories from their websites to the Telling Our Story website at http://stories.usaid.gov. In addition, Missions can create their own website pages based on their stories' content.

What is the process for clearing the information submitted to Washington, D.C.?

The TOS Project Officer in Washington, D.C., will review all stories submitted using the online system. The story will then be cleared through the Mission, Bureau, and Desk Officer.

Can partners submit stories and, if so, how can I ensure that the information is cleared?

Anyone can submit stories using the Telling Our Story tools. When USAID/W receives information from an identified partner, the TOS Project Officer in Washington, D.C., will clear the content with the Mission, Bureau, and Desk Officer.

Chapter **8**

Get Your Mission Into *FrontLines*!

USAID's NEWSPAPER

FrontLines is the Agency's newspaper. This monthly publication seeks to capture policy and operational developments at headquarters, document successes in the field, and feature human-interest stories about agency employees and recipients of USAID assistance. Serving both an internal and external audience, it is mailed and e-mailed to USAID friends and contacts, including current and former employees, Congressional members and staff, non-governmental organizations, high schools, and universities. It is also available on-line at http://www.usaid.gov/press/frontlines/.

The following is a list of frequently asked questions put together by the people who prepare *FrontLines* in USAID's Washington, D.C. headquarters. The answers to these questions should help Missions identify stories for submission.

What kinds of articles are likely to be published?
Because *FrontLines* is primarily an employee newspaper, we are interested in articles about the work USAID employees do. The editors are interested in success stories about projects, human interest stories about employees and aid recipients, announcements about significant program changes and milestones, upcoming events, Letters to the Editor, and opinion pieces responding to previous articles. Take a look at editions in the new format and you'll get a good idea of what is appropriate.

What writing style should I use?
Articles should be newsworthy. They should be written like those submitted to a newspaper, and not filled with jargon or technical language. Remember, these are news articles—not reports, briefings or speeches. If possible, include direct quotations, examples, and other information that will bring your story to life. Try to avoid acronyms, abbreviations, organizational charts, and jargon that won't be understood by most of the audience. Don't worry—we'll be glad to do any necessary editing.

TIP:
Articles should be written like those submitted to a newspaper, and not filled with jargon or technical language.

How long should articles be?

Articles come in a variety of lengths. Some short articles will be 100 to 250 words. Medium pieces may run 250 to 500 words maximum—no more than that. We have writers on staff to polish the stories, and the editors will edit articles for content, clarity, and length, so the articles, photographs, and pull-quotes will fit on the appropriate pages. The best guidance: Make it long enough to cover the subject, but short enough to still be interesting.

What about quotations—how do I collect them for my story?

Stories on USAID projects, challenges, policies, missions, and personnel will be more vivid and readable if quotes are part of the text. For example, a story on USAID-supported measles vaccination programs could be more interesting if it has a quote from a mother or father whose child contracted the illness before the program was launched—and then quotes from those receiving the vaccination.

How do I obtain clearances prior to submitting an article?

FrontLines is your newspaper-for employees, retirees, and friends of USAID. Authors should clear articles with their regional or pillar Bureau Assistant Administrator *and* Mission Director. While the newspaper is intended for the USAID family, it is important to remember that *FrontLines* will also be posted on USAID's website and mailed to others, so it will reach a larger extended family.

What are the chances that an article I submit will be published?

The editors determine which submissions will be published in *FrontLines*. Publication depends upon a variety of factors: the perceived level of interest to USAID readers, the timeliness of the article, its readability, the inclusion of good photos, and the space available. If you have an idea, but you're not sure how to go about putting an article together, we have writers to help. In fact, you can just submit story ideas and our writers will take it from there.

Will my name be used as a byline?

We want to encourage better communication throughout USAID and one aspect of that is maintaining a two-way communication between potential authors and their audiences. Bylines that identify the author of an article enable interested readers to pursue the subject directly with that author. Unless there is a particular reason not to use a byline—for example, if it was a group effort attributable to many—an article in *FrontLines* will identify the author. If you have specific concerns, the *FrontLines* staff will be glad to discuss them with you and work out an appropriate arrangement.

Do I have to submit photographs?

You are strongly encouraged to take photographs for your story. If you scan through recent editions of *FrontLines*, you will notice that the most interesting articles are accompanied with photos or charts. The old adage about a picture

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being worth a thousand words is especially true in a publication like *FrontLines*, which emphasizes lots of photos and charts.

What are your guidelines for submitting photographs?
Glossy color prints (4x5 or larger) or high-resolution digital images (with a minimum of 300 dpi and an image size of 1472x1104 pixels) are preferred, but color slides will be considered; however, reproduction quality may suffer. *Images from PowerPoint presentations or those imbedded in Microsoft Word documents can't be used.*

If possible, photos should depict people involved in the activity, not merely shaking hands, sitting around a table, or lined up and smiling at the camera. Candid shots of people are preferred, but significant scenery shots, photos of equipment and USAID projects, or local-color shots are acceptable if they help dramatize a story.

Photos should always include typed captions identifying people from left to right, with their job titles. Avoid writing on the photos themselves, except for identifying numbers on the back to correspond with numbered captions submitted with text. If submitting by e-mail, include the captions in your document and the photographs as attachments to it.

How do I get a picture taken?
Although the *FrontLines* staff can sometimes find photos and graphics to support your article, the best pictures usually come from contributors who have taken the photographs as they developed the story idea and wrote the first draft. Encourage any amateur photographers in your Mission to take photographs for you in return for a credit when the picture is run.

How can I obtain more information on submitting articles and photographs to *FrontLines*?
For information on submitting articles and photographs to *FrontLines*, please contact us at (202) 712-4330, or send an e-mail to FrontLines@usaid.gov. You may also submit articles by mail to:

Editor
FrontLines
USAID
Ronald Reagan Building
Suite 6.10
Washington, D.C. 20523-6100
Fax: (202) 216-3035

TIP:
If possible, shoot photos that depict people involved in the activity, not merely shaking hands, sitting around a table, or lined up and smiling at the camera.

Chapter **9**

Branding & Marking: FAQs

WHY BRAND?

USAID helps to develop and fund hundreds of programs and partnerships worldwide. According to federal legislation, this U.S. foreign assistance must be marked with the approved brand: USAID: From the American People (see front cover). The authority for this brand and mark is the Foreign Assistance Act of 1961, section 641, as amended, which states that USAID programs "shall be identified appropriately overseas as 'American Aid.'"

Since the *USAID Graphic Standards Manual* was first released in January 2005—after consensus was built amongst the U.S. government and U.S. public—USAID's branding initiative has promoted awareness of the use of American taxpayer dollars to improve lives worldwide. From Guatemala to Georgia, the Agency brand serves to:

1. Improve recognition of U.S. foreign assistance efforts delivered by USAID

2. Raise visibility amongst foreign audiences about their partnership with the United States

3. Deliver a clear message: From the American People

4. Mark USAID programs as credible (building a "brand recognition" of accountability and progress)

5. Show transparency of U.S. foreign assistance efforts

HOW DO WE BRAND?

On January 8, 2007, USAID released the revised ADS Chapter 320, which provides USAID policy and requirements on branding and marking applied to acquisition and assistance awards. Separate branding policies and marking

WHAT MAKES A GOOD STRATEGY?

A Branding Strategy or Marking Plan may follow the same strategies that help shape Mission communications strategies. See A.17 for specific sections and questions to consider when planning for communications.

requirements apply to each. Therefore all DOCs and Mission staff should be familiar with this chapter (www.usaid.gov/policy/ads/300/320.pdf).

Under acquisition awards such as direct contracts, USAID requires *exclusive* branding and marking of programs, projects, activities, public communications, and commodities. It is helpful to be familiar with the components that will be required from USAID and contractors to explain how branding and marking will be accomplished under this type of award.

● **Branding Strategy:** USAID must develop a strategy for inclusion in the Statement of Work for a solicitation of goods or services. The strategy should be designed to tell prospective contractors what the Agency is looking for in terms of visibility and positioning for the program, activity, or product. No branding strategy template exists but ADS 320.3.2.1 very clearly states what should be included. Each branding strategy should be well tailored to meet the specific circumstances of the USAID activity.

● **Branding Implementation Plan:** Interested contractors or existing contractors *respond* to the Branding Strategy within the solicitation with how they propose to implement it (320.3.2.2). How will they promote the activity to "beneficiaries and host-country citizens?" What materials will be used, how, and when? How will project milestones/key indicators be addressed? These questions should be answered within the contractor's proposed plan.

● **Marking Plan:** Interested contractors also must respond to the Agency with a Marking Plan describing how the USAID Identity will be applied on public communications, commodities, materials, and goods. USAID receives *exclusive* marking on contracts. In some cases, a host-country logo or another U.S. government logo may be included if appropriate. Review ADS 320.3.2.4 which gives a detailed description of what a marking plan should look like. This can help if you are asked to consult on the USAID review panel.

Under assistance awards, including grants and cooperative agreements, USAID co-brands or co-marks with the partner organization, whether there is cost-sharing or not. Under this type of award, the Agency seeks equal size and prominence (ADS 320.3.3.1) of the identity and requires a:

● **Branding Strategy:** Under co-branding, the "Apparently Successful Applicant" submits a Branding Strategy upon request from the USAID Agreement Officer. The submitted Branding Strategy should cover the same material as noted above, including how the program will be positioned and promoted. The difference with an assistance award is that this strategy is then negotiated between the parties and finalized upon agreement.

● **Marking Plan:** Co-marking does apply under an assistance award. The "Apparently Successful Applicant" submits a Marking Plan upon request that shows how the partner logos will be made visible—equally and with the same prominence. (If USAID is the majority donor and if the program is especially visible for USAID, the Agreement Officer may determine that the USAID logo should be more prominent.)

A Note on Exceptions and Waivers

A misunderstanding may exist at your Mission about what a branding and marking exception entails and what a waiver is and is not. In both acquisition and assistance awards, clear directives are outlined in ADS 320: Branding and Marking. For a quick breakdown of differences however, see Chart 1.

Chart 1. Exceptions vs. Waivers

Exception	Waiver
ADS 320.3.2.5 22 CFR 226.91(h)	ADS 320.3.2.6; 22 CFR 226.91(j)
Only if it would interfere with *programmatic* goals of an activity. (It is not circumstantial, in nature.) Consideration may be given for usual, non-emergency practices such as: • democracy activities, • reports where the findings must be viewed as independent, • host-country "ownership," functionality, • substantial costs, • offend local practices, • conflicts with international law, or • deter achievement of program goals.	Only for adverse circumstances that affect implementation—security, political, safety concerns, or an adverse reaction in the host country caused by the marking. (A waiver is granted for circumstantial reasons.) To grant a waiver, the contractor or Mission must make the case that there is: • "compelling political, safety, or security concerns."
In acquisition: Exception may be requested in a respondent's Marking Plan and can be granted during the normal award negotiation process; there is no separate appeal. In assistance: May be granted through the normal award or administrative process.	May be requested at any time.
Exceptions are granted by the AO/CO.	Waivers are approved by the USAID principal officer—either Mission Director or most senior officer in the USAID operating unit.

USAID works in relationship with partners—whether acquisition or assistance. After you confirm the type of funding (assistance or acquisition) and what their Branding Strategy or Branding Implementation Plan notes, try to emphasize that these ADS requirements are a part of every contract, grant, or cooperative agreement. The CTO may need to help address this and strengthen the understanding within the partnership.

WHO DOES WHAT?

Branding and marking responsibilities fall to a number of key individuals at a Mission—including the DOC at times. The Mission Director or principal officer at a Mission, for example, holds chief responsibility to ensure compliance and understanding of USAID branding and marking policy amongst USAID staff, interagency colleagues, including the Ambassador, and host-country governments. The Mission Director usually designates an employee to act as champion of branding and marking policy within the Mission.

For a full understanding of roles and responsibilities, carefully read ADS 320.2, Primary Responsibilities. Here is some basic information about the DOC, CTO, and CO roles, as well as what you should expect from implementing partners. (*Note*: This section does not replace any portion of ADS 320.)

The DOC Role: As the outreach and communications specialist at a Mission, you can serve as advisors to COTRs and COs/AOs on a Branding Strategy and Branding Implementation & Marking Plans. Advance input from the DOC is often recommended to ensure coordinated and appropriate contractor activities meet Agency requirements. A DOC can work closely with partner organizations, in coordination with the COTR, to implement USAID-funded outreach activities during the life of the program and provide any necessary training to Mission staff or partners as well.

The COTR Role: The COTR is responsible for overseeing the partners' compliance with the necessary requirements of the award, meaning review of materials. It is up to the CTO to take appropriate actions to ensure this compliance or to request a waiver or modification. According to ADS 320.3.1.3: "If the CTO, (now COTR) notes any cases of non-compliance, or if the CTO, (now COTR) receives any allegations of non-compliance, he/she must alert the CO or AO and they must then determine the actual facts of the matter." (All branding and marking requirements may be audited.)

The CO/AO Role: As described in ADS 320.2, the Contracting Officer or Agreement Officer is responsible for including branding and marking procedures in solicitations and awards. They brief the partner after award on the requirements for branding and marking of the activity/program and are responsible—with consultation of others—for approval of any exceptions. The CO/AO will administer the instruments for partners to carry out branding and marking, and must take necessary actions in any cases of non-compliance.

Implementing Partners: As a DOC or USAID employee managing branding and marking issues with implementing partners, there are a few things you should expect and, in some cases, must require—depending on the type of award—from USAID's partners. In most cases, partners will connect with COTRs and consult

CAN IMPLEMENTING PARTNERS USE USAID-BRANDED BUSINESS CARDS?

No. Under ADS 320.3.1.6, contractors or grantees may not use the brand identity on any administrative communications, such as letterhead and business cards. (This policy replaces the guidance in the *Graphic Standards Manual*.) Partners may use "USAID Contractor" or "USAID Grantee" on their company card but it must be evident that they are "not a USAID employee."

with a DOC to plan for outreach events and materials. Some DOCs have provided cleared Mission guidance to partners and deadlines for press releases, media inquiries, publications, and other public outreach activities under the contract. This helps to coordinate actions and materials between USAID and the partners, as well as with the State Department Public Affairs Section, when necessary.

"Do not re-create the Identity under any circumstances."

CRISIS COMMUNICATIONS: BRANDING & MARKING

During the Burmese humanitarian crisis in 2008, U.S. assistance was delivered to the people of Burma. The job of properly branding this assistance and planning public events in the midst of the crisis fell to the DOC at USAID/Regional Development Mission for Asia (RDM-A). Working closely with the USAID DART Press Officer (see page 10.4) and the Embassy's PAO to coordinate efforts, she helped ensure that U.S. assistance was appropriately branded before it left for Burma. Just as when USAID/Indonesia properly branded U.S. assistance during the 2004 tsunami in Asia, USAID/RDM-A found it helpful to:

Have materials on hand: Having a stock of banners, stickers, and other branded products on hand before they were actually needed allowed the DOC to pull from the stock immediately. In Indonesia, for example, the DOC took extra stickers from a stockpile and asked volunteers to stick them to unmarked USAID boxes.

Order extra supplies: If you must order supplies at the last minute, put in another order at the same time to replenish your supplies. You will not know how long the crisis situation may last, and you'll be glad you thought ahead.

Know the vendors: Keep a sample of each branding item in your office. Tag it with the local purchase information to ensure you can order more. If you have all necessary vendor information, you will be in a better position to act quickly in case of emergency.

REFERENCES

Branding and Marking Website: www.usaid.gov/branding/
This external website contains all the links you will need to adhere to and implement branding and marking regulations. It will detail any updates or policy changes and include links to:

- USAID website guidance

- Logo graphics

- Branded templates

CAN I USE A COLOR BACKGROUND AGAINST THE LOGO AND BRAND?

No. Use the templates provided and share the guidelines often with partners. Follow these templates and provide them to design teams in advance so they understand that the logo, for example, must be placed on a white background in the upper left-hand corner. See examples on page 7.2 and 7.4 in the *Graphic Standards Manual.* Also, regularly share page 2.12 regarding the official color palette with designers, contractors, grantees, and Mission colleagues.

ADS 320: www.usaid.gov/policy/ads/300/320.pdf

This provides the main Agency standards and requirements for all branding and marking regulations.

USAID Graphic Standards Manual: www.usaid.gov/branding/gsm.html

This serves as reference for all branding & marking product development under acquisition awards. Clear examples of products can be found throughout the manual, including placement of the brand identity and specific color palettes that must be used consistently.

Translations: www.usaid.gov/branding/translated.html

"USAID: From the American People" is now translated into more than 120 languages and dialects, including Arabic, Farsi, French, Spanish, Russian, and Zulu. These translated logos can be downloaded for print and web use.

Templates: www.usaid.gov/branding/templates.html

Standard templates are available for:

● Fact sheets

● Press releases

● Fax cover sheets

● PowerPoint presentations

● Biography pages

Branded Products

If you cannot obtain appropriately branded supplies from local vendors, here are U.S. suppliers of:

USAID pins and stickers: www.usaid.gov/branding/suppliers.html
Banners and more, see Special Event Resources: http://inside.usaid.gov/LPA/events/
USAID hats, shirts, pens, and more: www.cafepress.com/USAID_online

Contacts

If you have specific policy questions, refer to ADS 320, revised. If you have design-related questions, first refer to the Graphic Standards Manual, www.usaid.gov/branding, or write to the Agency's Senior Brand Manager.

USAID BRANDING & MARKING BACKGROUND

In 2004, USAID undertook an effort to update its look. The goal was to clearly meet the mandate of the Foreign Assistance Act, section 641, which notes that Agency programs must be identified appropriately overseas as "American aid." Taking a former logo, adding a brand name and tagline, and making it easier to reproduce at any size helped the Agency better credit the American taxpayers who fund these activities worldwide.

As the new branding initiative took off, numerous in-depth consultations took place with senior staff, implementing partners, interagency officials, including the Secretary of State, and Congress. Focus groups were conducted and showed how the proposed brand identity was being perceived by foreign audiences.

In January 2005, USAID released by Executive Message notification of the final USAID Identity and a *Graphic Standards Manual*, which was provided for USAID-funded acquisition awards. Consistent use of this new identity was required on all Agency public communication products, including project plaques, press kits, banners, and posters. The USAID Administrator directed all contractors in a March 2005 letter, "in accordance with AIDAR Clause 752.7009, Marking (Jan. 1993), to begin, with all reasonable dispatch, using the USAID identity in all applications where the prior emblem or logo has been required and to follow guidelines in the *Graphic Standards Manual*."

On August 26, 2005, guidelines for grants and cooperative agreements were addressed in the Federal Register through the Final Rule, "Administration of Assistance Awards to U.S. Nongovernmental Organizations (NGOs); Marking Requirements." A period of "Administrative Rulemaking" followed, and then these requirements became effective on January 2, 2006. This regulation officially requires "all programs, projects, activities, public communications, and commodities" to be marked with the USAID identity.

See pages ii–iii in the *Graphic Standards Manual* for more background on USAID's 40-plus years of brand heritage. For up-to-date policies on branding and marking, visit www.usaid.gov/branding and see ADS 320.

Be sure Agency presentations use the branded template for PowerPoint slides.

Chapter **10**

Developing a Long-Term Communications Strategy

INVESTING IN A COMMUNICATIONS STRATEGY

Every Mission receives dozens of requests for participation at events each week. However, it's important that the senior management of the Mission think strategically about the best use of time and resources to most effectively deliver the Mission's overall message and inform local audiences about projects and programs carried out in partnership with the host country.

Given that most USAID Missions have limited personnel and resources, one of the most challenging aspects of the Mission's outreach is developing a communications strategy to get out the message. Although individual press events and interviews serve a worthwhile purpose, having a thoughtful communications strategy that is understood by the key leadership of the Mission is integral to communicating most effectively. Whether the strategy contains a three-month timeline or a one-year timeline, what is most important is that it is developed with input from the Mission leadership and program officers, written down, disseminated, and then every effort is made to adhere to it. In addition, the strategy must contain specific resource allocations of time, funding, and methods to measure the impact of activities contained in the strategy. Some Missions develop a small internal working group to begin the process and ensure that each program office is vested in the overall strategy.

> Missions that have developed a successful strategy worked aggressively to ensure that the U.S. Embassy was apprised of the strategy's development and was able to provide input into the process.

AN INTEGRATED USAID/EMBASSY APPROACH

Missions that have developed a successful strategy worked aggressively to ensure that the U.S. Embassy was apprised of the strategy's development and was able to provide input into the process. In Jordan, for example, the strategy was shared with the PAO starting with the first draft, and extensive discussions took place between the Embassy and USAID to ensure overall buy-in and support for its implementation. This collaborative relationship, as well as involving USAID senior management, is critical as the strategy develops.

WHY CREATE A COMMUNICATIONS STRATEGY?

A communications strategy serves many purposes: It ensures that messages are coordinated and consistent, outlines a realistic set of objectives over a set amount of time with identified resources, articulates the Mission's public goals, and manages expectations about how information is communicated to partners and a larger host audience. Finally, and most importantly, a communications strategy identifies key audiences and the best tactics to reach them.

The best place to begin in terms of developing the Mission's communications strategy is by reviewing the Mission's strategic objectives and overall mission statement. These serve as the long-term goals for the Mission and are the starting point for developing relevant messages and themes. From there, you can ask these questions to help develop the communications strategy:

● What is the key theme or overall objective of our Mission?

● What are the goals we want to achieve in three months, six months, and one year?

● What are the two to three programs that we want to highlight? (Most audiences cannot absorb more information than that.)

● How can we ensure that the media is well informed about our activities?

● How can we identify which target groups we want to reach (for example, government officials, recipients of donor assistance, or, more generally, men vs. women, urban vs. rural, younger vs. older population)?

● What messages do we want to send to different target groups?

● What are the best media tactics for reaching those audiences?

● What other methods can we use to communicate with our audiences?

● What resources do we have available to us?

The strategy should then incorporate a realistic assessment of the Mission's strengths and weaknesses. For instance, is the Mission Director a dynamic public speaker who excels at television interviews, or does he or she prefer more low-key print interviews? The strategy should include a realistic assessment of those qualities, as well as the following logistical issues:

● Is the DOC the sole person available to develop and implement the strategy? If not, what other staff people are available to assist in this effort?

● Can a communications strategy working group be established so that the entire Mission takes more ownership of the plan?

● What is the best way to coordinate with the Embassy Public Affairs Section?

● In addition to the public relations skills of the Mission leadership, do we need to account for whether or not this project or partnership is particularly successful?

● Which programs best exemplify the partnership with the host country?

● What are the account distribution, viewer ship, ratings, and information concerning programming when assessing television, radio, and print?

● What local columns are read often?

● Do media roundtables work well in this environment, or do media site visits work more effectively to communicate our work?

● What public relations tools (events, brochures, video, news releases) have been used in the past? (An inventory of the tools that have been used in the past and their impact should be included, as well as proposals to consider new tools to reach certain audiences.)

● Have our implementing partners been included in our communications strategy? They are key to USAID's ability to tell the development story.

● Have host country targeted audiences—either general, like an urban audience, or specific, like a set of government officials—been identified?

MESSAGE DEVELOPMENT

Once you have decided on the Mission's overall public relations goal (for example, to increase public awareness of and support for USAID's assistance program in country X) and identified the key themes from the Mission's strategic objectives, you must begin the next and most crucial step: message development.

Messages are a clear, concise articulation of a program or project. Messages are not created in USAID speak, but rather in common, easily understood language. Often communications professionals refer to this as "kitchen table" language since it must be thought of as a way that people sitting around a kitchen table would discuss an issue. Messages must also be credible and should not overstate a program or project. Finally, and most importantly, they must be repeated over and over again to ensure that they are heard.

Thinking about how the headline will be written or the lead into a news story would sound often helps in creating a message. How we communicate— not just what we communicate—is one of the keys to successful global communications. We recommend that once priority themes are established (for example, anti-trafficking efforts to better protect women and children), several individuals—including the CTO, Program Officer, and DOC—work to

TIP:
Messages should not be created in USAID speak, but rather in common, easily understood language.

identify and refine the most effective language that can be used with the local audience.

COORDINATION WITH LPA

Each Mission should have a working communications strategy in place, and many do. Missions working on a strategy or updating one should develop it with the Mission leadership, Program Officers, and other appropriate staff. It should then be shared and reviewed with the U.S. Embassy Public Affairs Staff for coordination purposes.

After the Embassy and the Mission agree on the proposed communications strategy, forward it to LPA/W for approval and coordination. Follow this protocol:

● E-mail the DOC staff. They will provide official comments from appropriate LPA staff, including the Deputy Assistant Administrator for Public Affairs.

● Respond to this feedback and forward the finalized copy of the strategy to LPA/W.

In certain cases, LPA staff will also work in close consultation with the Mission on the outreach strategy.

A communications strategy template is provided in Appendix A.17. Once a communications strategy is finalized and in the implementation stage, please consider posting it on the DOC Forum website (refer to Chapter 5.2).

CRISIS COMMUNICATIONS

A crisis communications plan can help a Mission understand what, where, who, when, and how a natural or man-made crisis should be managed. It is recommended that each Mission create a crisis communications plan as a component of the communications strategy. In the unfortunate event of a crisis—such as loss of life or a humanitarian crisis—the plan can be activated quickly to accurately respond to the media and manage Mission communications during the crisis.

To prepare a crisis plan, first review the Post's Emergency Action Plan and become familiar with all standard procedures for potential crisis situations. In the case of a crisis which involves USAID or USAID personnel, the DOC should work closely with the U.S. Embassy PAO and keep the USAID Mission, Embassy, and other necessary actors apprised of the crisis response. Be sure to discuss media responses with the PAO, who often will be the primary contact for media. However, DOCs must also be prepared to manage media requests regarding USAID work when necessary.

DOCs should be familiar with the Post's Emergency Action Plan and discuss potential media responses to crisis situations with the U.S. Embassy PAO.

In the case of a declared disaster by a U.S. Embassy such as the Pakistani-Indian earthquake, USAID's Office of Foreign Disaster Assistance (USAID/DCHA/OFDA) provides immediate disaster assistance and coordinates the U.S. government response. OFDA may respond in a number of ways including setting up teams to support the response efforts. For the Pakistani-Indian earthquake for example, a Response Management Team (RMT) was set up at Washington, D.C., headquarters. OFDA also deployed a Disaster Assistance Response Team (DART) to assess and coordinate the U.S. government response to the crisis. The DART generally consists of a Team Leader and specialists trained in a variety of disaster relief skills. The DART may include the following team members:

- **Press Officer:** The DART Press Officer manages the overall media response to the disaster. The Press Officer reports to the DART Team Leader and LPA and works with the PAO and the DOC while conducting the disaster-related media response.

- **Information Officer:** The Information Officer collects, analyzes, and distributes information about all DART activities and disaster-related information to USAID/W and other U.S. government contacts. The Information Officer produces daily to weekly detailed fact sheets and updates and is responsible for verifying facts and figures.

- **Communications Officer:** This DART team member coordinates and conducts communications for the DART and oversees necessary equipment for DART communications. This member does not work with press or on outreach activities although the title may indicate otherwise.

In most cases, the DOC will continue to be the Mission's communications specialist and is not considered part of a DART. However, the DOC must coordinate activity with the DART Press Officer (or appointed DART member) in order to ensure an accurate and approved response to the disaster. If a Press Officer is not included on the DART in your country, be sure to receive updated fact sheets regarding the situation from the Information Officer. *Please note:* The DART will be working with partners in-country and will be supported by the RMT in Washington, D.C. For more on how a DART operates, refer to http://www.usaid.gov/our_work/humanitarian_assistance/disaster_assistance/resources/pdf/fog_v4.pdf.

In the case of a disaster at or near Washington, D.C. headquarters during which performance of Agency essential functions is disrupted, USAID will activate a Continuity of Operations Plan (COOP). Federally mandated for all federal agencies, the COOP is designed to mitigate the impact of such disasters by providing for an orderly recovery from disruption in a way that ensures essential functions continue; protecting essential systems, equipment, records,

TIP:
Be sure to coordinate with the DART Press Officer during a declared disaster in your region.

and assets; and organizing the recovery and reconstitution from a disaster. If activated, several senior-level USAID employees would relocate to an Emergency Relocation Site (ERS) where redundant facilities allow USAID to carry out its essential services. The DOC should clearly identify COOP coordinators in the respective bureaus at USAID headquarters and include the appropriate one as a contact in the Mission crisis communications plan.

The Mission's crisis communications plan should consider potential disasters or crisis situations and provide a framework for responding. Just as in the overall communications strategy, the crisis communications plan should identify the primary coordination points for forwarding information and the tools used to disseminate that information in an accurate and timely fashion.

Chapter **11**

Planning for Successful Site Visits

SHOWCASING U.S. FOREIGN ASSISTANCE

A visit to a USAID field project can greatly influence how a journalist or a Congressman perceives the effectiveness of U.S. tax dollars. A site visit to a USAID-funded school in Latin America or a micro-enterprise project in the Middle East will leave a lasting impression—and help form an opinion about the impact and effectiveness of USAID.

To plan a successful site visit, advance preparation is necessary. How you prepare depends upon who the visitor will be. Is it a journalist who wants to see what project X is about or how health assistance is being used in country X? Will U.S. Senators or Representatives be visiting the site on a regional tour? Or will you—as the DOC—be collecting information to send to the Mission and Washington, D.C., or to publish firsthand accounts?

Any site visit can be a unique opportunity to showcase the U.S. development partnership within the country. But not every project site will be an appropriate venue for all audiences. As you plan, first determine the answers to these questions:

- Who is the visitor?

- What do they want to see and why?

- What do you want them to see from USAID/X and why?

- Which project presents a good perspective on how U.S. tax dollars can be successfully used?

- Is a visit to the project site appropriate? Is it too politically charged? Are there security issues? Will it interfere with the project mission?

- What is the intended outcome of the site visit?

> A USAID site visit is often the only way to effectively showcase U.S. assistance abroad.

PREPARE FOR A MEDIA VISIT

When your audience for a USAID site visit is a member of the media, you wear the hat of Press Officer. In some cases, a reporter expresses an interest in seeing a site, such as one of the tsunami reconstruction projects. Other times, the DOC invites selected reporters to see the work firsthand.* For both cases, it is your role to determine what the reporters want, what they may intend, and how to best inform them of USAID's projects and programs.

Journalists generally ask who, what, when, where, and how. It's up to you to help provide these answers before, during, or after the site visit. Moreover, it is important for you to help express the why and stress the who. Why this health program over another one? Who is it really benefiting? The answers to these questions can help define how USAID works (long-term development) and the benefit of U.S. assistance abroad (provide beneficiaries with better health, improve education, create stable livelihoods, or promote economic growth).

Keep in mind that most journalists don't want a story "fed" to them; they generally prefer to find sources and information for themselves. Your job will be to provide the basic framework of a story in the way you plan the site visit and help them find the most pertinent information. Therefore, be ready to:

Do your homework. Make sure to talk with the project manager and the implementing partner to understand the most updated project statistics and the kinds of successes and challenges it addresses. After you understand the current project status, including who is involved and how it fits into the bigger development picture for the country, discuss a date and time for the media visit. *Remember:* For all U.S. and international media, please notify LPA/Press Officers immediately of the intention to invite media on a visit.

Find the story first. In understanding both the successes and challenges of the project, you'll be better prepared for any potential media "spins." Determine the stories you think could come out of this visit, both positive and potentially negative, and prepare yourself and the necessary Mission staff with the details.

Present the best sources to the reporter. You only have a limited amount of time to help educate visitors about the project. So plan the visit when known beneficiaries or a trusted source will be available to speak. Remember, reporters need to be able to capture an angle for their story and be able to validate their choice to an editor. If time is limited, it may be better to avoid a detailed technical briefing. Instead, use the site visit time to connect the visitor with the actual program beneficiaries.

USAID does not pay for media to join media tours. Transportation is often covered, and in some cases, expenses for overnight trips or a per diem may be allowed. Cultural customs can be observed, but please confer with the Mission legal counsel and LPA/W if you have any questions.

Be sure to give the reporter a fact sheet with the technical information needed to support the story either before or after the site visit.

Prep your Program Officers. Be confident that the Program Officer(s) and implementing partners understand who is coming and whether they should be speaking on the record or on background (see media information on page 4.4). Also, be aware that nothing should be assumed. Make it clear to the reporters what is on the record and what is not before going into the visit. Safely assume that everything is on the record—or at least that what the reporter sees and hears will be remembered.

Follow up. After the visit, you hope that the reporter will be back behind a desk filing a story. Even if that hope is optimistic, you should connect with the reporter and ask if they need any further information. Follow up is generally suitable one week after the visit if you don't see the story by that time. If you still don't see a story after making contact, check in with them periodically. Most will appreciate the gentle reminder of a potential story.

Verify the information. Whenever possible, ask the reporters to contact you to verify quotes and any financial details before print. For this reason, it is always helpful to maintain good professional relations with reporters. They may come to you as a source for the next story.

Manage expectations. You and the Mission want to see an article or mention of the project in the media. However, an immediate result from a site visit will not always be apparent. Manage expectations while continuing to foster the relationship with the media source. A story may not be written today, but it could be tomorrow.

SHOWCASE U.S. ASSISTANCE FOR A CODEL

Congressional delegation (or CODEL) and VIP visits may be regular occurrences at your Mission. If so, you perhaps understand the power of one site visit to create perceptions within Congress or the U.S. government. Congresspersons often can take away a substantial view of how USAID is working in the field and how appropriated funds are utilized.

If you do have the opportunity to showcase a USAID project for a CODEL or VIP visit, keep the following points in mind to make sure you and the Mission are representing the breadth of USAID's work:

● Who will be leading the delegation?

● How much time do they have for a sufficient visit?

● Do you know this Congressperson's views on U.S. assistance?

- Have they visited other sites during their trip? If so, where?

- Have they been to country X before? Will they be repeating a site visit?

- How many delegation members will be attending the site visit? Will the numbers overwhelm the project site?

- Is the project site appropriate and safe for a U.S. Congressperson to visit?

- What do you want the Congressperson and his or her staff to most remember about the USAID project?

- Does the project contractor have ties to their district?

Once you have answered each of these questions, it's important to do your homework and prepare others for the visit—just as you would with a media visit. Determine the best project site to visit and then:

Coordinate. Work with USAID colleagues from the Mission and the appropriate LPA/W Congressional Liaison Officer and U.S. Embassy counterparts to propose the visit. Once agreement is reached on a particular site, work with the appropriate schedulers to build in sufficient time for travel and visiting. A two-hour ride for only 15 minutes at the site would not be an example of the best use of time.

Prepare backgrounders. Scene setters, fact sheets, and even previous Telling Our Story pieces can be put together for effective background information and quick reads. Provide enough copies of background material for each member of the delegation and a few extras for last-minute attendees.

Put the site into context. Make sure to put the project site visit into the proper context. Knowing the stance of the Congressperson or VIP beforehand can help you to determine which projects to discuss. Brief the delegation while in transport to or while walking around the project site and be prepared for a number of questions. For many, it is important to demonstrate how the program is becoming a self-sustaining project. When appropriate, be sure to address this point.

Show the human side of development. A visit to a sewing factory could be interesting, but viewing just the machines would be an incomplete view of U.S. assistance. Be sure to schedule the visit for when the sewers are working and the visitors can interact with the beneficiaries. The CODEL can witness exactly how the project is helping the local people and can carry that information back to Washington, D.C.

Follow up. Most likely a product will not be the end result of the site visit, but it is important to follow up and ask the CODEL or VIP staff if they need any

TIP:
Be sure to show how the USAID project helps people.

further information. If they do, please coordinate this effort quickly with the appropriate LPA/W Congressional Liaison Officer and Mission staff.

Debrief. Whether you or someone else is providing a report on how the visit was received, be sure to share this information with LPA/W and appropriate Bureau contacts.

BECOME THE REPORTER

Telling the USAID story may be done via the media or a CODEL visit, but we often must tell the story ourselves. Site visits by the DOC or another staff member can be just as valuable for getting firsthand accounts of the good work being done in the field. So when it's time to put on the reporter's hat:

Do your homework. Visit the project site already knowing how much funding it receives or how long it has been a USAID partner. It won't be beneficial to you or the partner to waste time on details that can easily be retrieved via the program office.

Find the story. By doing some homework and knowing what's been written beforehand, you can better frame how to make this visit different from previous ones. What will be the focus of your story? Who will you be writing it for and what will be the message?

Get solid sources. Find out how the project is helping local communities, and then determine whom to interview from the local community. Also, think about the partner organization: Within the partner organization, who is the most appropriate person to speak to about the daily project work?

Keep a strong angle. Some of the best stories get lost when a piece tries to tell too much. And at any USAID project there is always much to tell—from how money is being used to the many challenges presented. Try to stick to two or three main points, keeping a strong angle for your piece. For example, if there is a group of people at the site visit, interview only one or two—in addition to, if appropriate, the group leader. Be sure to verify pertinent information, including their name and age.

Add an anecdote. Strengthen your story for the reader or listener with one or two anecdotes about your experience at the project site. Describe the little girl's reaction to the new schoolyard with a swing or detail the gentleman's joy while interacting with customers of his two-year-old business, thanks to USAID funding.

Verify the information. Once the visit is complete, read over your notes and quotes immediately. Verify your handwritten notes and fill in any blanks. Call the implementing partner with any follow up questions. And be sure to fact check all name spellings as well as any financial figures with the project

TIP:
When it's your turn to be the "reporter," remember to focus on one or two strong elements of the story.

manager. Finally, be sure to thank all involved for taking the time to help you complete the story.

Package it for punch. Telling Our Story, *FrontLines*, the Mission website, and Mission newsletters are all good venues for sharing the project story. However, there are a number of other ways to capture this information and disseminate it. For example, consider relaying it in brochures you may produce at the Mission or incorporating it into an upcoming Mission Director speech. What anecdotes can be taken from the site visit and added to the story?

Thank the partner. The partner and the Program Officers involved in the site visit provide you with a valuable piece of their time. Sending a thank you note and any appropriate photos of the project immediately after the visit is a nice way to show appreciation.

Please note: Washington, D.C. relies directly upon you and implementing partners to hear the success stories from the field. Please cc your Bureau and LPA contacts to make sure the good word gets told.

CAPTURE THE STORY: PHOTO TAKING

General tools for any site visit include a pen, paper, and a camera. Whether you're with a reporter, a delegation, or by yourself, the site visit presents the best opportunity to capture images of what's happening in the field. USAID is enhancing its ability to better tell the story with strong images of U.S. development work.

For any USAID employee visiting a project site, it is important to take and share production-worthy photos. One DOC at USAID/Guatemala has even trained the Mission drivers to take photos. As you build your photo library, keep these tips in mind:

1. Know how your camera works. Before visiting a site, understand how your camera works, including the flash, the shutter speed, and the focus. If it's a new camera, practice beforehand.

2. Focus. Make sure the camera is focused on the main subject before snapping. Even if the camera tends to "soften" the other objects in the lens, the main subject will be in focus.

3. Set the DPI. In general, production quality for the web, print, or other use, should be no less than 300 dpi. So make sure the camera is set to fine quality or a similar setting. Even though this will take up more memory space on a digital camera, it will provide photos that can be produced well.

4. Think of the light. Even the best photo moments can be lost in too much light or not enough. Don't take a picture with the sun behind the subject and

POLICY:
Remember to send Mission photos to USAID/W for use. Good images are always needed.

use a flash if too much shadow falls across the person's face. Natural light falling from the side of the subject/person generally provides an appealing and clear image.

5. Move in close. While a landscape photo may be worthwhile, generally it is good practice to make sure you are close to your site. When photographing people, make sure you can zoom in more tightly on the person. For example, focus on them sitting at a piece of machinery rather than on the row of machines.

6. Frame your shot. How you choose to tell the story of a project will show in how you frame the photo. What will be in your photo and how will it support the story?

7. Look for a different angle. Try not to frame every photo with the main subject in the middle. Some of the best photos show the main subject to the right with a group or a landscape behind them. Think about whether the image could be more powerful with the main building to the far right of a photo. Also, be sure to focus on the recipient of U.S. assistance-not just the VIP or Mission Director. Even if the event focuses on a VIP, find an angle that incorporates the VIP's presence without always making them the main story.

8. Keep it clean. Too much clutter in a photo can confuse the viewer. While it may look okay, a cluttered photo—like one with a wildly patterned background—can miss the main point of the story and distract the viewer.

9. Capture emotion; not just the action. For an agricultural project, it's often enticing to take a photo of the field. While this is appropriate, it is not always the best way to tell the story. If you can, take a picture of one field worker (not 10) working in the field. Look to capture the work on that person's face. Try to catch the look in their eyes. This can help capture the human interest to be found in any project's story.

10. Wait…patiently. When you're taking a photo of a person, capturing emotion requires much patience. Sometimes a lag time on your camera shutter won't capture what you intended, or perhaps the subject does not feel comfortable with a camera pointing in their face. Whatever the case, be patient and stand by with a camera poised; you may have the opportunity to capture a stunning image in the midst of familiar conversation.

> A good photo can always help you to better tell the story.

Photography tips developed with help from field practice, www.kodak.com, and Lori Epstein, a photo editor for National Geographic.

Chapter **12**

Building Websites that Work

USAID ON THE WEB

The Internet is one of the most powerful tools for sharing information. In today's fast-paced 24-hour news cycles, it is, in fact, a necessary tool. The Internet expands USAID capabilities to educate the public about USAID and what it does, its development partnerships, and its program goals. It allows USAID to move this information quickly across all borders. With one simple click, a student in India can access information about the purpose of U.S. assistance projects in Ecuador.

DOCs who create content for the Mission, Bureau, or Agency websites often understand the intricacies involved in reaching out to various Internet and intranet communities. As with other communications tools, a website should target key audiences to be most effective. Although the lines between these audiences may be blurred, a focus on one or two specific ones can produce better results than attempting to speak to every person who visits that website.

The good news is that DOCs can repurpose information to reach more audiences on the different USAID websites available. By sending information posted on the Mission website for upload to the Bureau website, DOCs can share the most recent Mission news with regional colleagues. Or perhaps a report uploaded to the Mission website could be most valuable for the main USAID website. DOCs should consider how to best share information among the three groups of USAID targeted audiences: country partners and beneficiaries, USAID internal colleagues, and U.S. policymakers and influencers.

MISSION WEBSITES

Most USAID Missions now have an external website to showcase U.S. assistance in a country or region. These Mission websites can reach out to host-

> A USAID website gives readers an entry point to understanding what USAID does.

country audiences, specifically targeting local partner organizations and influential leaders. DOCs and the Mission web team work with staff to create an engaging website, which typically includes the following:

- Country specific information
- Facts and figures
- Updates and announcements
- Partner information
- Employment opportunities
- Contact information

LPA strongly encourages the Mission website to be hosted on the main USAID website to allow for more exposure.

BUREAU WEBSITES

On the USAID intranet, each regional and pillar Bureau maintains a website to share information about regional or functional issues with a USAID audience of senior staff and Bureau colleagues. DOCs have an opportunity to reach this internal USAID audience when they repurpose Mission articles, newsletters, releases, or stories for Bureau-related websites.

Bureaus rely heavily upon Missions for solid information and news from the field. DOCs can help relay Mission information by copying appropriate Bureau web managers on communications products that help describe country programs or goals. This ensures your Mission's presence on the regional pages of the intranet as well as the potential to have Mission projects discussed on the main USAID website.

USAID WEBSITE

The Agency website focuses mainly on a U.S. and international audience of policymakers, researchers, and partners. USAID's overall activities are highlighted, and specific sector information provides details on worldwide programs. The website aims to give an influential audience the facts, figures, and human interest stories of U.S. assistance undertaken by USAID.

Be sure to work with your Bureau communications and web contacts to create a strong presence on the website for your Mission's activities. *Note:* Remember the pillar Bureaus, including the Bureau for Economic Growth, Trade, and Agriculture (EGAT); the Bureau for Democracy, Conflict, and Humanitarian Assistance (DCHA); and the Bureau for Global Health (GH). For example, if you have information on a new malaria-related health program, share it with your regional Bureau as well as the GH communications team.

For a listing of up-to-date Bureau communications contacts at USAID/W, visit http://inside.usaid.gov/LPA/survival_manual/. Use this list to copy LPA and any relevant Bureau correspondents.

FREQUENTLY ASKED QUESTIONS

What standard should the Mission website follow?

Federal regulations determine what can appear on official USAID websites and how content must be designed. Under Section 508 of the federal regulations, a U.S. government website must be accessible to all, including hearing- or visually-impaired persons.

Find Section 508 guidelines and other website requirements—from proper branding to privacy notices—at http://www.usaid.gov/info_technology/xweb/.

Who must approve USAID-related websites?

All USAID websites must be approved by the Director of Public Information, Production, and Online Services (LPA/PIPOS). For review and approval of content and layout, e-mail lpa.uploads@info.usaid.gov. Be sure to receive any necessary approval from your Bureau as well for website content.

If you plan to update a section or make any significant changes to an existing Mission website, you must receive LPA/PIPOS approval for the new material before posting.

How often should content be updated?

One of the most effective ways to turn potential audiences away from USAID is to have outdated information on the website. In this age of technology, people expect immediate updates. While it may be challenging to meet this expectation, regular updates should occur at least once a month.

Be sure to update and coordinate changes with the network of web managers and communications specialists at USAID/W. Email updates to:

● LPA/W web team contact

● Mission web manager

● Bureau web manager or Bureau-assigned representative

What if my Mission does not have a website?

Most Missions now have a website. In fact, it is encouraged for each Mission to host a site. Even in rural regions, Internet connections can be found in classrooms or centers. In rare cases it may not be effective to invest in a Mission

Remember to inform your Bureau and LPA/W contacts of Mission website updates.

website, but before opting not to create a website, the pros and cons should be carefully considered.

If you do not have a Mission website and wish to create one, work with LPA/PIPOS. The LPA web team can help support the Mission's technological needs. Contact lpa.uploads@info.usaid.gov.

How do you get your stories posted on the USAID website?

The Agency web team ultimately determines what information is posted on www.usaid.gov to represent the Agency. If you wish to help shape the content of the main site, come up with success stories or pertinent information that would be suitable for a wider audience in the United States and abroad. Work with USAID/W communications specialists and tailor the information to help post it on the main site.

Telling Our Story provides the most effective means to post program stories regularly (see Chapter 7). To upload a human-interest piece into the appropriate format, visit http://www.usaid.gov/stories/.

Where can I find the most reliable website resources?

1. XWeb provides detailed USAID guidelines for creating, updating, approving, and maintaining a USAID website. Visit http://www.usaid.gov/info_technology/xweb/.

2. Bureau web managers or the LPA web manager assigned to a particular region are excellent sources for best practices. Work closely with all involved to ensure coordination, especially when updating a site.

3. If you can't find the answer to your web-related questions on XWeb, email lpa.uploads@info.usaid.gov.

BEST WEBSITE PRACTICES

On Content

● Engage the Internet reader with interesting and informative content.

● The best way to turn away a potential reader is to leave old information sitting on a website. If it is May 2006, a reader does not want to see a page that was last updated on May 2004. If information is displayed for historical perspective, clearly define this or do not include a date on the page.

● Make sure every word counts. Headlines and subheads serve as entry points into the text for a reader. Be sure the title captures the viewer's attention and accurately portrays the information in that section.

● As with all communications products, the website should be in layman's terms. Avoid technical jargon; translate the technical into "kitchen table" language, which can be more easily understood.

● Make content quick, direct, and focused on the main points.

● Write in complete but brief sentences, and provide strong leads in short paragraphs.

● Highlight key pieces of information. Internet readers tend to scan material and may generally stay on a website for only a few minutes. Capture their attention, but realize that you may not have it for long.

● Do not use a passive voice to describe program events. For example, write "More than 100 people received vaccinations," rather than "Vaccinations were given to more than 100 people."

● Use bullet points to provide clarity for important details.

● As a general rule, place no more than 750 words on each page.

● Make sure all content is approved by LPA/PIPOS and other necessary staff.

● Aim to translate Mission content into any relevant country languages.

On Layout

● The homepage provides the first view of USAID/X. Be sure it allows easy reading and clear entry points into specific sections.

● Avoid technical links that take the reader unnecessarily away from the main page. A number of links can also potentially test the reader's patience. Consider whether the country uses dial-up connections for example.

● Avoid too much animation or clutter. Someone viewing the website in Morocco may have an extremely long wait for the web page to upload due to the special animation feature. The purpose of a USAID website is to provide information; not entertainment or distraction. Keep it simple and clean.

● Don't mark incomplete web pages with "Under Construction" notices. If the content and layout are not ready for the general audience, do not post. Rather, unveil the new page when it is complete and ready to be seen by all.

● Don't let a large photo on your website potentially turn away a viewer. Reduce the image size first, and then post. In general, images should be no larger than 75 dpi in JPG or GIF format.

● Provide graphics to a web page to lighten the appearance of heavy text on the site. Follow the tutorials for graphics posted on XWeb for setting up:

- Accessible PDFs

- Streaming video captioning

- Accessible data tables

- Skipping repetitive navigation

● Be sure LPA/PIPOS approves the layout, including meeting all necessary federal regulations and providing the correct branding components.

Keep your USAID websites simple, clear and most of all effective.

Chapter **13**

A Guide to Polling and Focus Groups

MEASURING USAID COMMUNICATIONS

Monitoring and evaluation are bread and butter words for USAID; every project conducted with U.S. foreign assistance funds must be closely evaluated to determine impact and document lessons learned. When it comes to USAID outreach activities, we hold ourselves to the same standards.

Two methods employed by Missions to effectively measure USAID outreach activities include polls and focus groups. USAID/Indonesia, for example, employed a local firm in 2005 to conduct a baseline survey, identifying local awareness levels of U.S. assistance in the country nearly a year after the tsunami. Focus groups were held to understand opinions held by local audiences, and from these results, the Mission tailored a five-week outreach campaign. To successfully complete evaluation on the impact of its campaign, USAID/Indonesia then conducted follow-up polls.

For a few Missions, polling and focus groups may not be viable options. For those Missions considering these tools, however, the DOC and staff should understand how to successfully work with professional research firms and avoid errors and time-consuming, frustrating pitfalls. The following guide helps you navigate potential pitfalls by explaining what survey researchers do, the differences in sampling methodologies, and some best tips for designing survey questionnaires or focus groups.

David Williams of Williams & Associates conducted polling and focus group trainings at three regional DOC training sessions in 2006. Below he shares his expertise from extensive survey work around the world, including in Afghanistan, Bosnia and Herzegovina, Bulgaria, Croatia, Lebanon, Macedonia, Pakistan, Romania, Serbia, Ukraine, and the West Bank and Gaza.

THE IMPORTANCE OF POLLING

By David Williams

The most crucial benefit to polling for communications professionals is to get—and then monitor—shifting public opinion attitudes in response to the messages we deliver to targeted segments of the public. As communications professionals, we attempt to:

● Evaluate people's attitudes on issues or programs based on current levels of information.

● Communicate certain ideas and messages about these issues and programs to the public.

● Measure the change in public attitudes on the issues based upon the new information they received during the communications process.

In order to alter perceptions—or correct misperceptions—there are three stages we need to complete.

First Stage: We should understand what perceptions are—not what we believe them to be. Our main objective therefore is to establish the current state of beliefs held among our targeted population. This is done through the use of a "benchmark" survey.

A benchmark survey sets the boundaries and contours of a particular issue or set of issues that we want to understand. Benchmark surveys cover a wide range of issues—many in very minute detail—and are comprised of a large sample of people. Upon completing a benchmark you should have a comprehensive understanding of the issues and high level of confidence in the results. As well, you should be able to determine the best messages for different constituencies and the most effective channels of communications to deliver those messages.

Second Stage: The second stage in changing perceptions comes by delivering the message to intended populations through well targeted communications channels—such as strategically implementing an outreach campaign.

Third Stage: In the third stage, we conduct follow-up surveys to evaluate the effectiveness of the communications in altering public attitudes and behavior based on beliefs. These follow-up surveys may have fewer questions, but they should include the same questions used in the benchmark survey to ensure accurate, direct comparisons to the initial or baseline results.

Some people consider survey research in non-Western countries to be a hopeless effort. Critics worldwide say that residents of X country can't understand the process, won't be truthful in their responses, or they'll refuse to participate

because of fear or ignorance. My professional experience as a pollster has been exactly the opposite. People, especially those in a "closed" society, have very strong desires to have their voices heard. As critics point out, however, it is true that you must understand the culture and respect local customs and traditions. For this reason, we hire local agencies to conduct the research, advise on the questionnaire wording, and hire, train, and supervise interviewers. Afghanistan is one of—if not the—most challenging countries in which to conduct a survey. Lack of roads, infrastructure, low literacy rates, suspicion of outsiders, and strong tribal customs would seemingly make this environment impossible for research. Yet, a survey conducted for the Presidential elections in 2004 was as accurate as any done in the United States.

UNDERSTANDING RESEARCH METHODS

In most cases, a number of different research vehicles are available to accomplish the goals of your communications research project. The most common and widely used are:

Public Opinion Surveys Public opinion surveys are best characterized by their focus on the general population. They may focus on a specific segment of the general population (young people, females, or elites, for example) but their main interest will be the general public. Public opinion surveys are generally completed using three main methodologies: telephone interviews, Internet, or in-person, door-to-door interviews. In developed countries, the telephone and, increasingly, the Internet are the most utilized methods for collecting data. In countries that have low Internet access and landline telephone penetration, in-person, door-to-door methodology is often used. When conducting public opinion surveys (which include benchmark or tracking surveys) the interviewing is always conducted among a new sample of respondents.

Panel Surveys Unlike public opinion surveys, panel surveys evaluate a sample of respondents who were interviewed in previous surveys. Panel surveys are frequently employed in political or advertising campaigns to measure the behavioral shifts in specific voter groups or audience segments, such as undecided voters. In panel surveys, our interest is only among these specified groups.

Focus Groups Focus groups are used at varying stages in the research process. They are conducted among a limited number of respondents (between eight to 12 people) and are designed to gain in-depth information on the issues of concern. Focus groups are particularly valuable when developing questionnaires, designing communications strategies, and evaluating the effectiveness of your communications strategy and message delivery. Please note: Focus groups do not replace public opinion surveys. No matter how many focus groups are done, the results remain "qualitative" only and can never appropriately be quantified.

***A more detailed discussion of the specific differences between quantitative (surveys) and qualitative (focus group) methodologies appears on **page TK**. ***

APPLYING RESEARCH FOR BETTER COMMUNICATIONS

Combining research methods can provide crucial information to build a more effective communications strategy by focusing on the four major elements of message delivery:

The Audience Who are the people we are trying to reach? Are they women? Men? Younger? Older? Do they live in urban or rural areas? Are they citizens of the host country or is the audience in the United States? Are they funding development projects or are they beneficiaries?

The Message Once the audiences are defined, the issues that are most important to these audiences need to be understood. Are they concerned with national versus local issues? Are there gender issues, age issues, or ethnic differences in the issues that are involved?

The Delivery Next, you should apply the most appropriate or effective media to reach your targeted audiences with the message developed. Email and direct mail are the most cost effective means of message delivery but access to these methods in developing countries is often limited. If a target audience includes college students, access to the Internet—including in many developing countries—can be the most efficient delivery method. The delivery medium could also be one of the more overlooked ones, like billboards, or the more cost effective ones like traditional broadcast media (television, newspaper, radio). In many cases, it may be more basic methods, like door-to-door visits, events such as rallies and concerts, or direct mail. Consider all of these and determine which can be the most appropriate in your country.

The Spokesperson Probably the most overlooked element of the communications strategy is the spokesperson. This individual or these individuals are responsible for delivering the message effectively to all target audiences. Consider that young people often have less credibility, for example, in delivering messages about social security to the older generations. Likewise, older individuals make poor communicators to young people on fashion trends; men may not make the best spokesperson at communicating about issues like reproductive rights to women and so on. Knowing who is credible to deliver the message to the audience of interest is a fundamental requirement to deliver the right message. For some Missions, designated government officials will be the only spokespersons, but the above should always be considered.

The methods and techniques employed in survey research can be tools to uncovering answers to these questions. Survey research used appropriately will

help you identify who you have to reach. It will help discover the most effective message or messages that speak to and resonate with this target group. It can help you identify the best medium to deliver the message; and it will uncover the strengths and weaknesses of a potential spokesperson. Finally, by using tracking surveys, you can monitor the movement of public attitudes and beliefs after the communication strategy has been deployed.

QUANTITATIVE RESEARCH: THE SURVEY

In its most basic form, research is meant to gather data, analyze it, and then interpret the data. Applied social research projects are ***standardized*** procedures based on principles of scientific methodology. What is important about the collected information is that as much bias as is humanly possible is removed from the process so that it captures a true snapshot of the public opinions at the time.

Quantitative research provides information on attitudes of a randomly chosen part of the population (or what we call the sample) by asking the same set of questions. Based on the answers received, we can draw a conclusion on attitudes of the total population from which the standardized sample was drawn. The key here lies in the word standardized. As long as we carefully follow a standard protocol in every survey we do, the results will be accurate, within a defined range of tolerance, reproducible, and therefore reflective of the general population. These results could then be quantified.

In quantitative research, we select a small portion of the population to interview by using a sampling procedure that eliminates the natural tendency toward a person's bias. For instance, in 1996, I was training volunteer interviewers in Ukraine by using a version of a "mall intercept" methodology. (In the mall intercept, interviewers are stationed at various locations where there is good foot traffic and they are instructed to interview every certain number of persons walking past, such as every fifth person.) At one point a trainee asked why he could not just interview people from his own political party. This is what people tend to want to do; talk with people from their own social, economic, ethnic, or religious group. Unfortunately, this doesn't yield an accurate cross section of the larger population.

TAKING A SAMPLE

Sampling theory is actually pretty simple although the procedure for drawing a sample—particularly for in-person, door-to-door samples—can be complex and is best left to professionals. A rough understanding of the process, however, is helpful to determine what the appropriate options are for a potential project. Samples are based on probability theory; if you obtain a representative sample of a

population, you can make predictions about beliefs and actions of the larger universe from which it came. To put it simply, think of a jar full of different colored jellybeans. If we know how many jellybeans are in the jar and we count how many of each color jellybean are in a small sample—say a handful—we can predict within certain limitations the total number of each color jellybean in that jar.

The key is to ensure that each sample is **random**. In the jellybean example, the candies in the jar must be well mixed. To do this in the research field, we employ several sampling techniques depending on which interviewing method we plan to use. The two most widely used are **Equal Probability of Selection Method (EPSOM)** samples and samples that rely on **Probability Proportionate to Size (PPS)**. Most samples use a combination of techniques to determine respondents so it's helpful to have some insight into how they are drawn.

EPSOM, or Equal Probability of Selection Method, samples are mainly used for conducting telephone research and are the easiest to design and comprehend. An EPSOM takes a listing of potential respondents and then a systematic selection method is used to select the respondents from a list; a simple mathematical equation is normally employed to determine which names on the list are selected. Think of a list of 10,000 telephone numbers from which we want to draw a sample of 1,000 respondents, for instance. Essentially we want to select every 10th number on this list—which is commonly called the **skip pattern**—and each number that corresponds to our skip pattern becomes part of the sample of respondents. In effect each number on the list has the same probability of being selected (one in 10) as every other number on the list—thus the name Equal Probability of Selection Method. You can use this method whenever you have access to a workable list of names, addresses, customers, or telephone numbers of all the members of the population. If you don't have a list with all members of the target population, then you will need to develop a different design strategy.

Note: In telephone surveys, since all telephone numbers are not published, the random digit dial (RDD) technique was developed to compensate for unlisted or not-yet-published numbers. The RDD method uses the EPSOM method to select working telephone numbers and then replaces the last two digits of the phone number in a randomized pattern to generate a new and complete telephone number.

PPS, or Probability Proportionate to Size, samples are most frequently used in developing countries and were the most widely used sampling design in the United States until the late 1970's. These samples are most often used with the in-person, door-to-door interviewing method, frequently referred to as **stratified samples.** While the EPSOM sample uses a natural distribution pattern, stratified samples are engineered to achieve representative characteristics. The theory behind the stratified sample supposes that if the characteristics of a population are known, a sample can be structured that is reflective of those characteristics. For example, if we know that

40 percent of that population in a certain municipality is of type "A", 35 percent type "B", and 25 percent type "C," we can make a sample of 1,000 respondents with 400 classified as type "A", 350 of type "B", and 250 of type "C" in that municipality.

The interviews in stratified samples are distributed in stages usually starting at larger organizational units and working down to smaller ones. In the United States, we begin by distributing interviews into regional areas; regional interviews into states; state interviews into counties; and so until we reach Census blocks, the smallest organizational unit the U.S. Census Bureau applies. Because of this layered or staged distribution approach, this process is commonly referred to within firms as a **multi-stage stratified distribution.**

Sending interviewers into the streets to walk door to door and interview people can be expensive—even in developing countries. To minimize the expense, interviews are distributed in interviewing clusters, usually of seven. When a final geographic unit is chosen—usually referred to as a **primary sampling unit or PSU**—a predefined number of interviews, or clusters, are generated.

When cluster sampling is employed in conjunction with all the other elements discussed so far this sample is referred to as a **multi-stage stratified cluster** sample and is the most common type of sample design for the in-person, door-to-door interviewing (see Figure 1 on page TK).

The sample design has two additional components that are randomized to ensure that bias is eliminated in the responses.

● First, the interviewer needs to determine which household should be selected in the PSU neighborhood. This is accomplished through a technique referred to as a **random walk.** In a random walk, the interviewer is provided with a starting address and specific directions on how to move about the neighborhood selecting houses or apartments in apartment buildings. For example, the directions may be: "Start at this address and then go to every third house, working a clockwise direction." The specific directions are not important; the most important element is that the interviewers have clear directions and remain consistent.

● Second, the interviewer cannot simply interview the first person who comes to the door. Depending on the time of day, females or younger family members may be the only ones home. If only females were interviewed, the sample would not be an accurate representation of the population.

To account for this some sort of respondent selection criteria needs to be employed. The most commonly used by professional polling firms are the **Kish** grid and **most recent/or next birthday method.** Both of these methods employ a matrix that the interviewer uses to select the respondent from several potential scenarios within a household. There are matrices for each interview within the cluster. As one matrix is used the interviewer must move to another matrix until all have been used.

If you plan to conduct polls regularly to gauge awareness, be sure to keep the wording of questions the same in follow-up polls. Any deviation could negate the accuracy for comparisons.

In the below example of a Kish Grid, you'll note that if there are two adult males in a household with three adults, the interviewer is required to interview the youngest male. The same essential process is used with the most recent/next birthday method. These methods are essential in ensuring that interviewers are not simply selecting the most convenient respondent or the one they are most comfortable interviewing. By using respondent selection methods, we eliminate potential bias.

Table 1. Example of Kish Grid Respondent Selection Matrix

| | | Respondent Selection Key Version 1 NUMBER OF ADULTS IN HOUSING UNIT | | | |
		1 adult	2 adults	3 adults	4 or more
Number of Men In Housing Unit	**0 Men**	Adult	Oldest Woman	Oldest Woman	Youngest Woman
	1 Man	Adult	Woman	Youngest Woman	Man
	2 Men		Youngest Man	**Youngest Man**	Youngest Woman
	3 Men			Oldest Man	Woman or Youngest Woman
	4 or More				Youngest Man

Once again the exact method employed is not important, just that some respondent selection method is used to diversify the sample. The following chart is the basic representation of Multi-stage Stratified Cluster sample employing household and respondent selection criteria.

Country	Regions	Municipality	Neighborhood	Household	Respondent

PSU

- Random selection of households as secondary unites of selections based on random address selection for randomly selected starting points.

- Random selection of person as a final unite of selection within household.
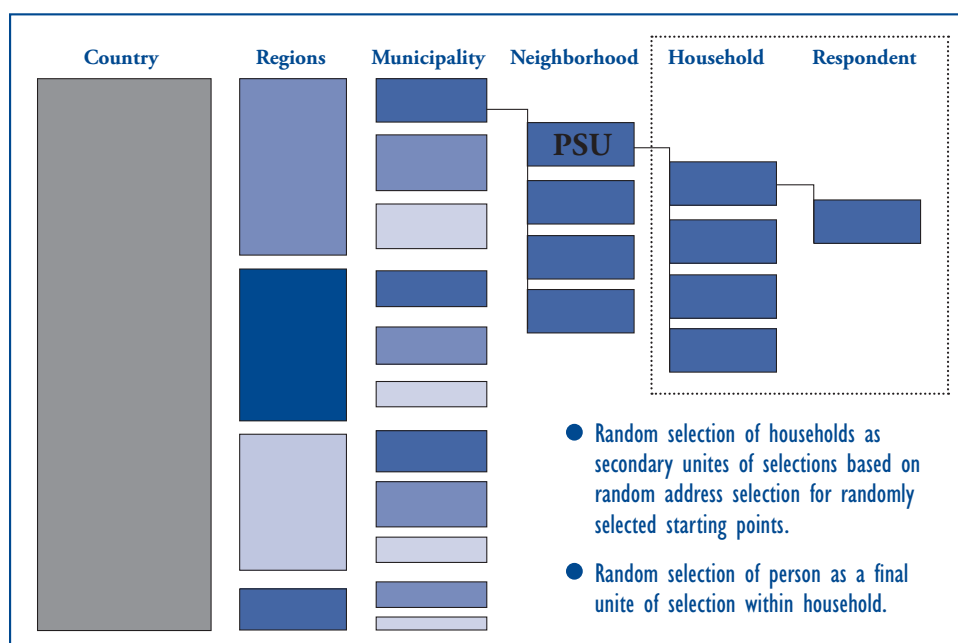
WHAT IS THE SAMPLE SIZE?

Another major issue to consider when you plan to conduct a quantitative survey is how large a sample is needed. In other words, how many interviews need to be completed? This is not as easy to determine as it may seem.

The size of a sample is determined by two main factors—three if the budget is included. A sample size is usually determined by 1) what is the lowest level of analysis desired and 2) what is the maximum sampling error that can be tolerated. The decision on the lowest level of analysis is determined by whether the survey is focused on an entire population or whether there are significant subgroups that need to be analyzed in detail. If the survey's focus is on subgroups, sufficient numbers of interviews have to be completed in order for analysis of the subgroup to be valid and reliable. Thanks to modern sampling techniques, the minimal number of interviews to be completed is between 800 to 1,500 interviews.

As a general rule, it is only necessary to complete more than 1,500 interviews if significant attention needs to be focused on specific subgroups (geographic or demographic).

WHAT IS SAMPLING ERROR?

A sampling error is a statistical parameter that tells us how accurate the result to a survey sample will be if applied to the general population from which the sample was drawn.

SAMPLE METHODS TO AVOID

In most cases, the sample design you encounter will be similar to those discussed above. In rare cases, suppliers may offer other designs. Remember, not all are valid. Avoid these two sample designs whenever possible.

Simple Random Samples, or SRS samples, are generally unworkable in most situations. In the SRS method, a list of all potential respondents needs to be created and a selection process using a random number generator selects the respondents to be interviewed from the list. The first problem with the SRS sample occurs with the creation of the list, if we were interested in sampling the adult population of even a small country, like Macedonia, we would need a list (names, addresses, and other contact information) of nearly two million people.

The second problem occurs in the selection and interviewing process. Even if we have a master list of a population's adults, significant effort must be made to find and interview each one of those selected from the random selection process. Other methods can more easily use respondent replacement strategies than the SRS sample.

Although we do not recommend SRS as a sample design method itself, in some samples this method may play a role: As a respondent selection method within households instead of the Kish Grid or for selecting neighborhoods within a stratified sample. As a sampling method on its own, it should be avoided.

Snowball samples, also called respondent-driven samples, should always be avoided. This design is common among market survey research companies and should never be considered valid applied social research. In many closed society environments, particularly patriarchal ones in the Middle East, it can be relatively common to have research companies suggest (or demand) the use of this method. In a snowball sample, respondents are asked to recommend other individuals to be interviewed. The problem that arises is that people tend to generally know, and therefore recommend, those who share the same values and opinions. This leads the research to a form of distortion called self-selection bias.

Suppliers will propose snowball samples because they are much less expensive and time consuming to conduct than other sampling methods. However, they are not reliable. So if a supplier recommends or insists upon this sample, reconsider the supplier.

NO RELIABLE CENSUS?

A lack of official (or at least reliable) population counts can pose a major problem to a sample's foundation. This is especially true in developing countries where a census often does not occur for decades. Even in the United States, however, there are questions about the accuracy of population counts. Despite the best intentions of those responsible for enumeration, undercounting among the same population groups occurs. The best you can do is use whatever statistics you have that are published and accessible.

Take, for example, an election-day poll conducted for the Afghan Presidential elections in 2004. Afghanistan had never had an election so I had no data to turn out. The only population data available based much of its projections on satellite photography, so clearly this was not a reliable source. Our only option was to use voter registration data collected three months (or more) earlier. While this is generally not the most reliable data to base an election survey on, it was all we had. In the end, it was the right data for this particular election.

TIPS FOR DESIGNING A QUESTIONNAIRE

Questionnaires are the most overlooked element in any research process. But designing an effective questionnaire is one of the most important steps of the process. Our stated primary goal in conducting survey research is to collect unbiased results—accurate results that can be reproduced. The discussion above on sample designs demonstrates how far researchers will go to minimize bias. All that effort is wasted if the questionnaire contains poorly constructed questions—or worse—leading questions.

If your USAID Mission is working on the design of a questionnaire, you'll want to be sure that several different types of questions are used in the questionnaire. There are open-ended questions, where respondents are allowed to answer in their own words, and closed-ended questions where respondents are required to answer within specific categories. Each has its own advantages and disadvantages. Open-ended questions allow for subtlety in the response and a feeling of control from the respondent, but they also are more difficult to process because the responses must be grouped within broader categories and then supplied with numeric codes for processing. While closed-ended questions are easy to process (they already have numeric codes), they are limited in what kind of information you can collect from them.

HOW TO SPOT A BIASED QUESTION

The wording of a leading or biased question can be subtle. Apply common sense and sensitivity to words that may color someone's perspective. The classic example of one kind of biased question—the no-way-out question—appears below. In this example, there is no way for the respondent to answer the question without defining himself as a spousal abuser.

Have you beaten your spouse lately?
   1. Yes
   2. No
   3. (Don't know)

If he answers 1, then that's clear; 2 perhaps means not lately anyway; and if 3 is answered, he doesn't know whether it has been lately or not.

The better way to pose this question is:

Have you ever beaten your spouse? [IF YES] How recently?
   1. Yes
   2. No
   3. (Don't know)

Questionnaire design can be almost as complicated as sample design. Follow these guidelines to avoid the pitfalls when writing or reviewing a questionnaire:

Make Questions Clear and Concise Use plain, commonly understood language and avoid extra words. Make sure to provide the interviewer with phonetic pronunciations if you have names that are difficult to pronounce. If you have to ask a complex question, or have complex answer categories, use show cards. These are cards that the interviewer hands to the respondents to read.

Keep Questions Balanced and Complete Be sure that all potential responses to a question are provided on the questionnaire. This includes always having a "don't know" response category for each question—even ones where it may seem unnecessary. As well, make sure that questions do not have a bias written into them; keep them fair by avoiding words and phrases that lead respondents to answer in a certain way.

Notice the Question Placement The placement of one question can influence all questions that follow so pay attention to the order of questions. This will lessen the effect of bias. If we were doing a survey on the awareness of USAID funding in a particular country, for example, we wouldn't begin the

questionnaire by explaining what USAID does in the country, how much money is spent, which programs receive funding and then ask if the respondent has ever heard of USAID and the work it does. We would do it the other way and ask general awareness questions first. Remember, a questionnaire should be designed to release information about an issue at a controlled pace. As the general rule, work from the general to the specific.

Review the Questionnaire's Final Draft Make sure that all edits, corrections, additions, and deletions are made, and double check that all interviewer instructions and skip patterns (as discussed on page TK) are accurate. The worst thing that can happen is to have problems with the questionnaire after it has gone into the field. The time spent ensuring that all is correct beforehand will be well spent.

Pre-Test the Questionnaire Under the best circumstances a questionnaire can have a slight imperfection in wording, or with skip patterns, or with incomplete answer categories. Testing the questionnaire by interviewing a small sample of respondents will draw out any weakness in the design and allow for correction before the survey is sent into the field.

There are other guidelines that you can follow, including ensuring that a questionnaire is culturally appropriate. The main point here is to keep questionnaires simple and direct so that respondents can easily understand what's being asked of them and answer them accordingly. The added benefit, of course, is that the more clear and concise a questionnaire is, the easier it will be for interviewers to administer the survey—leading to fewer errors in the process and providing accurate results.

QUALITATIVE RESEARCH: WORKING WITH FOCUS GROUPS

Qualitative research is an integral part of effectively communicating to your target audiences. The most popular form of a qualitative survey is the focus group. Focus groups can provide the first insight into an issue and how a population perceives and speaks about it. A well-conducted focus group allows you to fully understand the reasoning behind attitudes, the motives behind behavior, and the ways to address problems and avoid disappointing an intended audience.

During a focus group, a guided conversation among a small group of participants (usually eight to 12 people) takes place for 60 to 90 minutes. Unlike the highly structured interviewing process of quantitative research, focus group results can only be qualitative. We use focus groups for two specific purposes in the research process. First, the results from focus groups are instrumental in creating better, more accurate questionnaires. The group's results cannot be quantified, but the information revealed in the group's responses can be

A Monitoring and Evaluation section should be included in any communications strategy created for the Mission or by a partner.

quantified when used to write questions for an opinion survey. The second major use of a focus group is for testing the specific communications points developed through the survey process.

In general, a good research design for supporting a communications program takes the following steps:

Step 1: Focus groups are conducted to develop an in-depth understanding of the issue(s).

Step 2: A questionnaire is developed from the focus group results, the survey is conducted and the results are quantified.

Step 3: Advertising or communications programs are developed using the data from the survey to generate messages.

Step 4: The advertising/communications developed from the survey are tested among focus groups to ensure that the proper message is being fully delivered.

Analyzing the results from quantitative surveys is fairly straightforward; for focus groups, it may more complicated. Focus group results—like the groups themselves—are subjective. We generally hear what we want to hear and the groups tend to reinforce those preconceptions. Be sure to ask your supplier to prepare a report on the main findings of the groups' discussions and to supply transcripts (in English) and video or audiotapes of the complete focus group sessions.

Here are some important points to keep in mind when conducting focus groups:

● **Make sure that the moderator of the group has familiarity with the subject matter.** The groups should be slightly structured to allow for expansive discussion on particular issues if appropriate. The moderator needs to be aware of the important aspects of the subject (i.e. USAID and its development work); when to continue discussion on a specific issue; and when to get back to the main point.

● **Conduct focus groups even if a state-of-the-art facility isn't available to you.** Modern focus group rooms are wonderful to behold with their up-to-date video and audio recording equipment. They may even have comfortable seating for observers behind one-way glass. While these are nice amenities they are not necessary to the group process. Some of the best focus groups occur in municipal buildings with the videographer's camera inside the room while the client (USAID, in this case) watching on a television from an adjoining room.

● **Be careful in creating the composition of the group.** Again the whole concept with focus groups is to stimulate a free-flowing discussion about a

particular issue or set of ideas. The group dynamic must foster this atmosphere. Occasionally, participants holding diametrically opposing views are put into the same group when we attempt to do fewer groups. As a general rule, its best not to mix people who hold strongly opposing views unless this is your intended purpose for research.

● **Arrive early if you're observing a focus group.** Nothing can ruin a focus group quicker than having the participants know sponsors of the groups are speaking a foreign language or are of another nationality. During focus groups conducted in Belgrade, the owner of the facility was excitedly describing all of the new equipment he had recently installed during one of the sessions. Unfortunately, we were immediately outside the focus group room and the moderator had to stop the group, leave the room, and ask us to quiet down. He then returned to the participants and spent a considerable amount of valuable group time explaining why English was being spoken in the hallway.

WHAT DOES A DOC DO IN A FOCUS GROUP?

Well you've decided to do some focus groups and you've hired a supplier to do them. You're all done, right? Not quite. Hopefully you've hired a supplier that 1) has done focus groups before; and 2) has some experience with the subject matter at hand. Even if the supplier's experience is impressive, you must remain involved in the process.

A supplier may have an idea of what information needs to come out of the groups, but no one has a better understanding of the issues than you. You must be an active participant in the writing and editing of the focus group discussion guide, and you should physically witness the groups as they are in progress. It is fascinating to watch a moderator uncover the layers that make up a person's beliefs. More importantly, by watching the groups, you are witness to the unraveling process and can keep the moderator on a discussion or direct him or her toward an issue area as it develops during the conversation.

HIRING THE RIGHT AGENCY

To hire a firm or agency, you follow the same guidelines as hiring a new employee or a contractor. There are a few elemental steps you can take to make sure that the agency you're interviewing has the necessary qualifications to complete your research project.

Think About the RFP Process Prepare a Request for Proposal (RFP) with very specific survey specifications. While most of the terms used in survey research are commonly understood, there may be some confusion. Take a look at the following construction to note the difference between a "question" and a "variable" for example.

> **QUESTION:** Please tell me if you have a favorable or unfavorable opinion of each of the following countries?
>
> **Scale:** 1. Favorable   2. Unfavorable   3. (Don't know)
>
> United States–Russia–Great Britain–France–Sweden–Germany–China

Is it one question? Or is it seven questions by country? You will find it numbered both ways. Technically it is seven "variables" with each country counting as one variable. In responding to RFPs, different suppliers may count questions in different ways. If they do, then you'll be comparing apples and oranges. For this reason, it's best to make sure that your RFP is clear in its specifications, including the sample size, sample design, interviewing method (in-person or telephone), questionnaire length (in time or in number of variables), and deliverables (such as data files, cross tabulation files, translated questionnaires, analysis, and reports).

Get to Know Them Personally interview the agency and tour their facility. On-site inspections of potential supplier's offices can reveal whether they are professional, have enough space for training of interviewers, use reliable processing equipment, or have appropriate focus group spaces or telephone stations for interviewing. Is space generally clean and organized? Do the phones work? These indicate the firm's ability to complete the job effectively.

Seek Recommendations Most people will go to the trouble of getting recommendations but then never call previous clients to hear for themselves how the agency performed. Just remember, any agency that's been in business for some time will have one or two disappointed clients so don't make a decision based on just one reference.

Review Samples Examples of a firm's work can give you an overall view of the quality of deliverables they provide. An agency may be reluctant to let you view samples of focus group tapes, questionnaires, and reports because the work can be proprietary (you wouldn't want outsiders viewing the results of your work either), but usually the agency will find something to share. You simply may have to agree to view the material while at the agency's office.

Ask for Procedures and "Control" Policies Every agency will have a process for training interviewers. What they may not have is a consistent one. Reliability of data depends upon the reproducibility of the process and that includes consistent interviewing. This consistency comes from well-trained interviewers, who come from good training procedures. So make sure to closely review a written policy.

It's also important to ask for the control policy of a firm. Some interviewers could cheat while asking questions. This is a rare occurrence, but at some point it will happen. Every agency should have a written validation policy where a percentage of the completed interviews are randomly selected and authenticated. How and how much (generally five to seven percent of the total sample) doesn't really matter. What does matter is that a process is in place and performed well. The control policy should also specify what steps and remedies are taken if fraud occurs. In one case during a poll in Macedonia years ago, questions arose about a supervisor of a group of interviewers. There was no indication of anything unethical occurring but there was suspicion and that called the results under the control of this supervisor into question. My supplier took immediate action by reassigning this individual and replacing or resampling all 70 interviews under that supervisor's control.

Keep Elements of the Survey In-house In developing countries, it is rare to find agencies using subcontractors. As the survey research sector grows, subcontracting portions of a project could increase as they have in the United States. For our purposes, it is important to have confidence in all of the pieces of the process so you know who is doing the work and if they are qualified. Find out what, if any elements, of the survey are being subcontracted out, get references, and validate the agencies involved. The most common place to find the use of subcontractors is in sample design, interviewing, data processing, and analysis and report writing.

Ask Competitors about Competition. The survey research community is generally pretty small; most agency personnel have either worked together or studied together at a university, so the principals tend to know one another. Competitors will give you a skewed (generally to the negative) view about their competition, but important information, such as reputation or processes, can be revealed.

Obtain Background of the Agency's Principals. When you interview a potential agency for hire you should meet the owners and top management. Be sure to know where they got their professional experience and what university they attended. Their reputation is important, but most of the work on your project will be done by lower level employees at the agency. Be sure to try and meet some of them in person during the on-site visit.

Avoid Unusual or "Creative" Sampling Methods. My general rule for sampling is to keep it as simple as possible (our discussion on sampling earlier already demonstrates how complicated it can be). It will be rare that you come across a supplier that may use some unusual elements in the sample, but it does happen. For example, in Croatia a prospective supplier formulated a sample design using variable cluster sizes (between five and 10 interviews per cluster depending upon the location). His design may not be wrong, but it was different; as a cautious (and superstitious) lot, we chose to use our standard method of operation and have uniform cluster sizes across all samples.

Find a Professionally Affiliated Agency. A professional association does not make an agency more superior to one who is not a member of an association. A supplier with a professional association, however, does hold some advantage. They will have:

● observance of a code of professional ethics and a standard of practices.

● ability to keep up-to-date on new developments and practices in the industry.

● opportunity to discuss issues with fellow practitioners at association meetings and events.

Numerous associations worldwide exist for survey research professionals covering several different research disciplines. Some to know include: the American Association for Public Opinion Research (AAPOR), the World Association for Public Opinion Research (WAPOR), the World Association of Opinion and Marketing Professionals (formerly the European Society for Opinion and Marketing (ESOMAR), the Council of American Research Organizations (CASRO), the American Marketing Association (AMA), and the Marketing Research Association (MRA).

USAID'S STANDARD SURVEY QUESTIONS

The USAID DOC team, in coordination with Dave Williams of Williams and Associates, composed a standardized set of questions for USAID Missions to use for polling. Two versions, a shorter and a longer template, are available and should be used by any Mission seeking to gauge general awareness levels in country. You will find the short- and long-questionnaire templates below.

Note: If USAID funds are being devoted to a communications-based poll or focus group for an overall Mission campaign, you are asked to provide regular updates and a final report on the Mission efforts to the DOC team and to Director of Public Information Joe Fredericks at jfredericks@usaid.gov.

Standard Foreign Assistance Survey Questions
(Short Version Questions in BOLD)

Notes on Usage:

In questions, "foreign assistance" can be used in place of "foreign aid" depending on local understanding and translation. Whichever is chosen, it must be used <u>consistently</u> throughout the questionnaire.

This questionnaire can be applied as a long or short version:

- The long version consists of all the questions EXCEPT question number 27 which should be eliminated when the long version is used.
- The short version consists of questions 27 through 32.

1. Are you aware of foreign aid being provided to the people of (COUNTRY) by other countries?
   1. Yes
   2. No—**[SKIP TO Q 3]**
   3. (Don't know)—**[SKIP TO Q 3]**

2. **[IF YES]** In your opinion how effective is this foreign aid?
   1. Very effective
   2. Somewhat effective
   3. Not very effective
   4. No effective at all
   5. (Don't know)

3. **[ASK ALL RESPONDENTS]** To the best of your knowledge, which countries have given foreign aid to this country? (Open end) **[PROBE THREE TIMES]**

   In which of these areas has this country benefited from foreign aid? **[ROTATE STARTING POINT]**
   1. Yes
   2. No
   3. (Don't know)

4. Creating betting job opportunities

5. Agriculture

6. Improved health care and health education

7. Better schools and educational opportunities

8. Cleaner environment

9. Promoting democracy and transparency in government

10. Building better roads

11. Helping to ensure free and fair elections

12. Disaster and humanitarian relief efforts, such as temporary shelter, food, and water

13. Other than what was mentioned on our list are there any other areas where this country has benefited from foreign aid? **[PROBE THREE TIMES]**

_____
_____

Thinking about the United States specifically, to the best of your knowledge, in which of these areas has this country benefited from aid from the United States? **[ROTATE STARTING POINT]**

1. Yes
2. No
3. (Don't know)

14. Creating betting job opportunities

15. Agriculture

16. Improved health care and health education

17. Better schools and educational opportunities

18. Cleaner environment

19. Promoting democracy and transparency in government

20. Building better roads

21. Helping to ensure free and fair elections

22. Disaster and humanitarian relief efforts, such as temporary shelter, food, and water

23. Other than what was mentioned on our list are there any other areas where this country has benefited from US foreign aid? [PROBE THREE TIMES]

_____
_____

24. Forgetting about whether your country actually receives aid from foreign countries. In general do you think that this country needs foreign aid?
1. Yes
2. No**—[SKIP TO Q 26]**
3. (Don't know)**—[SKIP TO Q 26]**

25. **[IF YES]** In what areas does this country most need foreign aid? **[PROBE THREE TIMES]**

_____
_____

26. **[IF "NO" or "DON'T KNOW" TO Q 24]** Why do you feel that way?

   _____

   _____

27. **(OPTIONAL BEGINNING QUESTION) As far as you know does the United States Government provide money and other assistance to (COUNTRY)?**
      1. **Yes**
      2. **No**
      3. **(Don't know)**

28. **Are you familiar with the United States Agency for International Development or USAID?**
      1. **Yes**
      2. **No [SKIP TO Q30]**
      3. **(Don't know) [SKIP TO Q30]**

29. **Would you say that you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable opinion of USAID?**
      1. **Very favorable**
      2. **Somewhat favorable**
      3. **Somewhat unfavorable**
      4. **Very unfavorable**
      5. **(Can't rate)**
      6. **(Don't know)**

30. **USAID provides money and other assistance to many countries. Can you name any programs in which assistance is provided through USAID in this country?**

   _____

   _____

31. **How much do you think the United States spends annually in (Country) to support its programs here? (NOTE: Should use local currency in answers)**
      1. **$0 to under $5 million**
      2. **$5 to under $15 million**
      3. **$15 to under $25 million**
      4. **$25 to under $40 million**
      5. **Over $40 million**
      6. **(Don't know)**

32. Since (DATE) the United States people have provided (AMOUNT IN LOCAL CURRENCY) in aid for things like building roads, improving education, providing clean drinking water, and helping improve agriculture production, and many other things. Does knowing this give you a more favorable or less favorable opinion of United States?
1. **Much more favorable**
2. **Somewhat more favorable**
3. **Somewhat less favorable**
4. **Much less favorable**
5. **(No difference)**
6. **(Don't know)**

33. From which of the following sources do you get most of your information about issues affecting this country?
1. TV
2. Radio
3. Newspaper
4. Magazine
5. Tabloid
6. Leaflet/brochure
7. Banner
8. Internet
9. Workplace
10. Relatives, friends, or neighbours
11. Educational institution
12. Other organizations (Specify_____)
13. Other (Specify_____)

Chapter 14

Performance Monitoring for Outreach Efforts

DEFINING OUR SUCCESS

The goal for USAID development outreach and communications is to raise awareness of USAID and U.S. foreign assistance activities. In order to highlight U.S. development and humanitarian assistance efforts among host country audiences, DOCs must understand and test what works. In Chapter 13, we focused on polling and surveys, two necessary tools to measure and potentially evaluate outreach activity—quantitatively and qualitatively. In this chapter, we expand the toolset to include a standard framework for performance monitoring of outreach activity which can be done at every Mission—regardless of funding levels. While evaluation is touched upon, this chapter focuses on performance monitoring and provides a step-by-step approach for building a plan to monitor outreach efforts.

Performance monitoring is as necessary for DOC activities as it is for any USAID program. When a Mission Director speaks to a student forum or when a USAID photo exhibit tours libraries to highlight more than 50 years of partnership, one of the first questions often raised is: How did it go? Anecdotal information and answers like "great" may be welcomed affirmations, but these responses will not and cannot tell us if four weeks of work to prepare and implement the exhibit helped to achieve the intended outcome.

Questions developed through performance monitoring can help determine these answers by asking, for example:

● Did the student audience of the speech understand the intended message?

● Was the photo exhibit executed well enough to help raise awareness levels of the country's partnership with the American people?

● Did we wisely spend U.S. taxpayer dollars on the series of events?

The more understanding we have of what works to disseminate messages to foreign audiences, the better informed the Agency and the USG can be in building needed partnerships and making resources count.

PERFORMANCE MONITORING IN DOC TERMS: THE BASICS

In most USAID programs, monitoring expectations are written into the contract, grant, or cooperative agreement in order to have an agreed-upon standard for program success. Performance monitoring provides a "systematic and routine process" for comparing implementation results with the planned results. Performance monitoring will help you understand:

● Resources that are provided

● Planned activities versus those actually implemented

● Outcomes of the activities

● Achievement as a result of the effort

Performance monitoring is the process we must use to routinely compare actual results to a preconceived plan or expectation we developed for that activity (consider the Mission communications strategy). By maintaining strong performance monitoring practices and holding communications and outreach activities to the same rigor of measurement as any other U.S.-funded program, the Mission can use performance monitoring results of outreach activities to:

1. Inform decision making

2. Manage for successful outreach activities

3. Build upon effective communications tactics

Better targeted outreach is a goal to strive for in your DOC efforts; resources must be effectively used to raise awareness of U.S. assistance efforts with beneficiaries and other key in-country audiences. Performance monitoring can help outreach specialists determine if the $1,000 spent on a media tour helped to increase article placements for USAID by 30 percent—the intended goal—for example.

Active performance monitoring can provide much useful information, but it will not always have the needed answers for a Mission. For instance, it *will not* be able to:

● Tell us why results are poor (do not assume poor results always come from poor action)

● Explain why we had good results

● Show how to replicate those good results

Performance monitoring ideally should be paired with regular evaluation if we wish to understand the factors that shape strong communication successes. Evaluation helps to explain why results met or did not meet expectations, answer if other factors should be considered, know if there is potential for sustaining these results, and answer if there are any unintended side effects. (See page 14.15 for more on evaluation.) As possible, USAID DOCs and Missions will be able to put in place performance monitoring and evaluation standards for outreach. However, realities of limited resources, time, and need assessment may dictate how much evaluation by a third/outside party may be conducted.

For now, performance monitoring is an expected activity for every USAID Mission—no matter the scale of outreach activities. As every Mission is expected to have a DOC and a Mission communications strategy in place, every Mission should include a performance monitoring plan (PMP) as part of its strategic efforts.

10 STEPS TO BUILD A PMP FOR OUTREACH

A PMP serves as a recording device and can help guide Mission communications and outreach—by systematically telling us what the results of our activities are. A well-developed and well-maintained PMP will:

Record history
A PMP provides information over the length of time that the plan is in effect. This provides a historical perspective on outreach activities and allows new DOCs to understand previous activities achieved.

Support *performance-based* decision making
If obvious markers (or indicators) are not being accomplished, a PMP can highlight areas for reconsideration. While this does not take the place of an evaluation tool, it can help to correct any glaring problems.

Measure results systematically
The most effective PMPs will maintain regular collection of data so that the team reviewing results can be assured that articles were scoured daily or that all speaking engagements were recorded, for instance. This systematic process allows for more accurate and reliable comparisons.

Guide activities
The PMP will show if the Mission reached its goals or achieved intended results. Review of the PMP on a six-month or yearly basis will help guide subsequent planning for outreach activities as well as help to manage expectations for their success.

Target resources

Above all else, the PMP helps show how to allocate valuable resources where they can be most useful. For example, do we choose to allocate funding to public service announcement targeted at youth or do we invest time and resources in Mission Director visits to rural communities in key developing regions?

Below are the 10 steps recommended to help establish an active PMP for your communications and outreach work. These steps cover the basics of any USAID performance monitoring plan and many of them come directly from USAID references noted under references on 14.22. We strongly recommend that you pair these steps closely with your Mission communications strategy (see template on page A.17).

STEP 1: DETERMINE THE OBJECTIVES

Many may say that the heart of a PMP lies with what are called performance indicators (Step 3). However, before delving into the "what" and "how" of data gathering, the DOC and outreach team at the Mission should answer the "why."

● What is the objective for outreach? Why communicate?

● Why analyze newspapers daily to see what they say about USAID or U.S. foreign assistance?

● Why keep track of efforts to integrate communications into the broader Mission framework?

Answers to questions such as these can be used to help target your primary objectives for engaging in outreach activities. Ideally, your communications strategy will provide you with the core objectives for why to conduct outreach efforts. Many Mission communications strategies seek to raise awareness of U.S. foreign assistance by a specific percentage. Under this objective, a number of measurable intermediate results may be deduced (see the sample PMP template on page 14.17). Direct relation between the PMP and an active Mission communications strategy is necessary. However, some Missions may need to tailor their objectives within the PMP to be more measurable.

If your Mission is in the midst of building a new communications strategy, you may want to work with a team to help develop objectives that are ambitious but realistically measurable. This team, which can be formed as a subgroup of your communications working group, can also be used to help create buy-in for the PMP in order to ensure that everyone at the Mission takes on some responsibility for maintaining it, understanding it, and reporting on its results.

Objective	Increased awareness of USAID programs in the northern region of country x

STEP 2: DEFINE THE RESULTS YOU WANT

Once your principal objective or objectives are determined, determining the intended results is the next step. Intermediate results help guide the Mission to reach its overall outreach objective. These results answer what *must* be achieved if you are to reach the objective—not what we would *like* to see achieved. See the example below and the PMP template. These help show how direct the relationship between the objective and results should be written.

Create a starter list of potential results by considering:

● What helps us to realistically reach our key communication/outreach objective?

● What is measurable?

● What is a clear and intentional *result*—not a combination of many results and not an activity?

● How can we write this result into defined wording and avoid any broad, brushstroke statements?

● Are there specific targets (audiences, sectors, etc.) for change that will support the objective?

Intermediate results should always be clearly measurable and realistic. As you develop them, carefully consider the resources driving communications activities, the size of the population, the timeframe, and the level of growth or success that could be expected. Then be clear about what the expected change is: whether it's a new change, no change or status quo, or a slight increase or decrease.

There is no minimum or maximum number of intermediate results to list under each objective. It is advisable however to limit the PMP to those that directly show if the objective has been reached.

Example of One Intermediate Result

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)

U.S. Embassies worldwide often provide a daily news clipping service. If USAID wishes to use the Embassy PAS media monitoring, the DOC or another USAID colleague should request that all USAID mentions be scanned for and reported on.

STEP 3: SELECT PERFORMANCE INDICATORS

PMP indicators measure for the *actual* results of an effort rather than the assumptions or expectations we hold about the outcome. These indicators act as the piece of the pie that defines what progress will actually look like. For this reason, it is important to carefully consider, clearly write, and effectively review each indicator to determine if it is indeed the best for capturing the most relevant pieces of information.

A helpful list of criteria developed for USAID performance indicators—and as recommended by USAID's TIPS resource on Performance Monitoring and Evaluation—include:

Keep it direct. An indicator should relate directly to the intermediate result we want to reach. Just because a press release is sent to a local journalist does not immediately equal an increase in awareness of the USAID program: Was a story written about it? How accurately did it portray the program? What is the readership of the paper amongst the target audience?

Stay objective; don't be subjective. Whoever reads a performance indicator should not be able to "interpret" what it means. Try to limit the scope of the indicator so it can be most appropriately crafted and clearly defined for any reader.

Think adequacy rather than perfection. They won't always be perfect. One indicator may not directly link to the result and objective in whole. But taken as a part of a group of indicators, it can provide valuable information to offer a full picture and answer whether the intermediate result was achieved as a result of a majority of indicators.

Consider quantitative when possible. It is helpful to have a specific amount or percentage to aim for in an indicator. Define them through numerical values so an objective framework can be set. Qualitative indicators are quite valuable as well, but the indicator must be written carefully to avoid any subjective interpretations by you, a colleague, or a new reviewer.

Target it. Performance indicators can help designate key audiences or key issues that the Mission communications strategy focuses upon; this helps match the performance indicator to the desired intermediate result and overall objective more directly. Some monitoring and evaluation experts will separate out indicators from clear targets for those indicators. (For example, a target of 20 percent would appear in a PMP under target.) For the purposes of our PMP template on page 14.17, we include targeted figures in the performance indicators.

Be practical. Above all else, the performance indicator must be practical so that the data can 1) actually be collected; 2) be consistently gathered at a reasonable cost; and 3) be timely. Choose an indicator that you can actually collect data on given your resources, time, and availability of information.

Make it reliable. Reliable indicators provide solid decision-making information for the DOC, the Mission, and the communications strategy as a whole. An unreliable indicator would be one that leaves you questioning the quality of data or, worse, leaves you questioning if the intended result was achieved or not.

Once you understand these criteria, write out a list of potential performance indicators for the intermediate result(s) you selected. Consult with your communications working group or PMP team or consider reaching out to other DOC colleagues in the region. (Example performance indicators from some DOCs and Missions appear below.)

Take the list of potential indicators and then narrow the selection to those which together can provide a well-rounded group of indicators that will help you clearly determine if the result was achieved upon your review of the PMP. Ask if the indicator brings useful and reliable information to make that determination. Does it directly link to the result desired? Is there a clear and practical definition for the indicator? Or is it vague and perhaps misunderstood by a new Mission employee? And, finally, how practical is it for a busy Mission and a one-person outreach team?

A general rule of thumb is: Do not have too many indicators that could confuse the process and cause needless information to be gathered. Take the best of the best and then—most importantly—define them well.

Example of One Performance Indicator

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)
Performance Indicator	Percentage increase in understanding of USAID amongst students attending five events in cities x, y, and z, as demonstrated by pre- and post-surveys *Target*: Increased by 30 percent

STEP 4: DEFINING THE INDICATORS

The performance indicators are selected. You understand the desired results and the objective(s) as defined by this PMP for outreach activities. Now you want to be sure that anyone on the Mission staff—at any point—can understand exactly what must be done in order to manage this PMP and gather the "right" information. A clear, objective, and succinct definition (or unit of measure) will be needed.

A PMP may include a performance indicator such as: "increase media interviews by 60 percent." Does the word interview include informal interviews that occur after events or only scheduled interviews? What is the 60 percent increase based upon? What is the starting figure?

Be clear in defining numerical figures and be careful in the actual wording of the indicator so you can minimize any potential for error in the data collection process itself.

Example of One Definition

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)
Performance Indicator	Percentage increase in understanding of USAID amongst students attending five events in cities x, y, and z, as demonstrated via pre- and post-surveys *Target*: Increased by 30 percent
Definition	Events may include USAID photo exhibits, discussions, speeches, fairs, or classroom visits with attendees and educators of five universities around cities x, y, and z. The 30 percent increase will be based upon average scores on a 5-question multiple choice, pre-event questionnaire delivered to attendees before the event; and then the same, post-event questionnaire delivered to attendees immediately upon completion of the event. Percentage increase will be calculated by determining the difference between the pre- and post-event questionnaires average scores, and taking that difference and dividing it by the pre-survey average score.

STEP 5: UNDERSTAND THE DATA SOURCE

You may have a strong objective, a good intermediate result, and plenty of indicators and definitions to shape your Mission PMP for outreach. But how will you obtain the data you need to fill in the blank spaces on your PMP chart?

Finding reliable sources for the regular collection of data can be difficult in many countries and quite difficult in a select few. For instance, unless a Mission can hire a firm to extensively research all newspapers and magazines, the Mission may need to select limited sources for consistent and reliable review of articles (for example, a Mission may have to limit its search to only the top 10 daily newspapers). Some things to consider when determining data sources are:

● What is the best mechanism or entity for collecting the needed data?

● Will existing data be used, such as an annual State Department Public Opinion poll on perceptions of the United States? Or will it be collected from new sources, such as the five most popular television newscasts?

● How do we describe it properly for all to understand exactly which source(s) we must use and where to find it?

● Does the Mission have the capacity to collect this information at a reasonable cost?

● What resources are available for monitoring? How will this affect the quality of the data?

Example of One Data Source

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)
Performance Indicator	Percentage increase in understanding of USAID amongst students attending five events in cities x, y, and z, as demonstrated via pre- and post-surveys *Target*: Increased by 30 percent
Definition	Events may include USAID photo exhibits, discussions, speeches, fairs, or classroom visits with attendees and educators of five universities around cities x, y, and z. The 30 percent increase will be based upon average scores on a 5-question multiple choice, pre-event questionnaire delivered to attendees before the event; and then the same, post-event questionnaire delivered to attendees immediately upon completion of the event. Percentage increase will be calculated by determining the difference between the pre- and post-event questionnaires average scores, and taking that difference and dividing it by the pre-survey average score.
Data Source	Two USAID Mission-produced 5-question, multiple choice questionnaires, delivered pre- and post-event

STEP 6: METHOD OF DATA COLLECTION

Once you know where to get data, it will be necessary to describe the methods for gathering it. How you plan to obtain information for your PMP needs to be clearly defined since this is the starting point that the other pieces in the PMP will depend upon. Using newspaper articles as a data source, for example, may mean that the method of data collection involves daily review of all newspapers at the same time every morning. At the end of the data collection period, totals for positive, negative, and neutral stories would be added up.

The method should be:

● Detailed

● Well structured to draw out information expected

● Clear on the scope

● Clear on the quality expected

● Clear on the timing of when to collect information (daily, weekly, monthly, quarterly, baseline study, etc.)

● Well vetted by the PMP/outreach team

There may be multiple methods for data collection of certain pieces of information. For our purposes, it is best to focus the method to one or two key items that will provide the necessary data. If more are considered necessary, the team may wish to review the scope of the performance indicator itself and determine if it should be more focused or perhaps split into two separate indicators.

Example of One Method of Data Collection

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)
Performance Indicator	Percentage increase in understanding of USAID amongst students attending five events in cities x, y, and z, as demonstrated via pre- and post-surveys *Target*: Increased by 30 percent
Definition	Events may include USAID photo exhibits, discussions, speeches, fairs, or classroom visits with attendees and educators of five universities around cities x, y, and z. The 30 percent increase will be based upon average scores on a 10-question multiple choice, pre-event questionnaire delivered to attendees before the event itself and then the same or similar 10-question multiple choice, post-survey delivered to attendees immediately upon completion of the event. Percentage increase will be calculated by determining the difference between the pre- and post-event questionnaires average scores, and taking that difference and dividing it by the pre-survey average score.
Data Source	Two USAID Mission-produced 5-question, multiple choice questionnaires, delivered pre- and post-event

Method of Collection	5 multiple-choice questions developed to test understanding of USAID and approved by the Mission DOC and/or monitoring specialist will be used in a pre-questionnaire format and delivered to all event attendees at least 15-minutes prior to the start of each of the five events.
	Within 5-minutes after each of the five events, a 5-question multiple-choice questionnaire with the same or similar questions on the pre-questionnaire shall be distributed and collected for review.
	Percentage increases shall be calculated per event. Raw data shall be collected per event for potential future use. (Note for this example: Some Missions may wish to weight each event based upon number of attendees or may not be able to provide questionnaires to all attendees effectively. Consider this as you formulate the method of collection and seek reliable but practical data for your purposes.)

STEP 7: FREQUENCY & OVERALL COST

Timing matters when it comes to reliability and consistency of our information. The PMP must therefore designate how often data is expected to be gathered and the cost it will incur for the Mission. Weekly, monthly, or quarterly or before or after an event? How often is it necessary to collect this data to help inform the PMP? Will it be high, medium, or low cost, and what does that mean: funding or personnel involved? Again be sure to consider reasonable costs, including time spent on information gathering and funds. It may only be necessary to review a data source, such as publications, bi-annually or maybe even once a year. (Typically, 3 to 10 percent of the total budget for a strategic objective is a reasonable level to spend on performance monitoring and evaluation).

This step in building the PMP allows you to further detail the method of data collection (Step 6) by narrowing the understanding of "when" data must be determined and reported to help understand the overall performance of outreach.

Example of Data Collection Frequency & Overall Cost

Objective	Increased awareness of USAID programs in the northern region of country x
Intermediate Result	Increased awareness of USAID amongst youth groups (defined targeted audience)
Performance Indicator	Percentage increase in understanding of USAID amongst students attending five events in cities x, y, and z, as demonstrated via pre- and post-surveys *Target*: Increased by 30 percent

Definition	Events may include USAID photo exhibits, discussions, speeches, fairs, or classroom visits with attendees and educators of five universities around cities x, y, and z. The 30 percent increase will be based upon average scores on a 5-question multiple choice, pre-event questionnaire delivered to attendees before the event; and then the same, post-event questionnaire delivered to attendees immediately upon completion of the event. Percentage increase will be calculated by determining the difference between the pre- and post-event questionnaires average scores, and taking that difference and dividing it by the pre-survey average score.
Data Source	Two USAID Mission-produced 5-question, multiple choice questionnaires, delivered pre- and post-event
Method of Collection	5 multiple-choice questions developed to test understanding of USAID and approved by the Mission DOC and/or monitoring specialist will be used in a pre-questionnaire format and delivered to all event attendees at least 15-minutes prior to the start of each of the five events. Within 5-minutes after each of the five events, a 5-question multiple-choice questionnaire with the same or similar questions on the pre-questionnaire shall be distributed and collected for review. Percentage increases shall be calculated per event. Raw data shall be collected per event for potential future use. (Note for this example: Some Missions may wish to weight each event based upon number of attendees or may not be able to provide questionnaires to all attendees effectively. Consider this as you formulate the method of collection and seek reliable but practical data for your purposes.)
Frequency/ Overall Cost	Data will be collected at each of the five events and recorded immediately. Cost of collection is low per event.

STEP 8: RESPONSIBILITY FOR DATA COLLECTION

Your plan to collect reliable and valuable data is prepared. Of course the implementation depends on someone actually collecting information and then recording it in the PMP. The Mission must therefore determine reliable sources responsible for:

1. Collecting the information from the data sources and from the methods defined. Who will be responsible for reading through newspapers for articles about USAID: a USAID employee or a public relations contractor? Who will review publications annually for USAID messaging?

2. Recording regularly the data into the PMP with accuracy

3. Relaying any immediate needs or problem areas to the DOC or team

4. Designating a replacement for data collection responsibility upon departure or leave of the key responsible party.

DOCs will often be the first person designated for gathering and recording information. While certain data sources will be best suited for the DOC to collect from and submit the data to the PMP, some will not be when we consider time and value added for the Mission. A balance must be found between the implementation of regular DOC activities and the careful monitoring of these efforts. A solid communications and outreach PMP will require teamwork from colleagues to reduce the strain on one-person DOC teams and allow for better understanding of communication activities overall.

Once the responsible person(s) is identified, remain consistent and have that person collect the same data for a given indicator consistently during the time allotted. Performance indicators and judgments regarding whether the Mission reached an intermediate result and ultimately an objective will only be as good as the consistent information upon which it is based.

STEP 9: ANALYZE THE DATA PERIODICALLY

The worth of a PMP is highlighted when the Mission reviews the information to help inform its decisions about which outreach activities to pursue and which to limit. After you have set the PMP, add a section that commits to regular review of the findings. Make it a part of the process:

● When will you analyze this information: Quarterly, bi-annually, or annually?

● What methods will you use to explain or show the data?

● How will you show comparisons between current performance and past periods of outreach activities?

● Were the collection methods and costs as reliable and reasonable as assumed? Was the PMP worth it?

● How will it be corrected or redirected for unreliable activity or lack of data?

Remember, it is critical for DOCs and Missions to use data to help inform decisions about pursuing one community activity over another. Should the Mission continue on with its current communications strategy? Do adjustments need to be made, such as ending certain activities or beginning new ones?

A NOTE ON DOC BUDGETS
Missions must first determine a budget for outreach and communication purposes and then estimate a reasonable cost for performance monitoring efforts. Under USAID standards, a reasonable amount generally ranges between three to 10% of an activity's budget—or the entire DOC budget for the Mission

("The Performance Management Toolkit," April 2003).

STEP 10: REPORTING OUT ON DATA

In outreach and communications, we exchange information and perform activities in an effort to inform host country audiences. The same thinking applies to our distribution and explanation of PMP findings. One person or one team knowing if or when an outreach activity showed real results may not benefit the broader team unless the results are reported regularly and broadly. This allows the Mission to showcase its results in development programs as well as its outreach successes and challenges. As well, the DOC supports the network by sharing best practices and lessons learned.

As the final step in your PMP development, provide and follow a dissemination or roll-out plan for the results. Determine:

● Method of communication: Emails, action memo, listserv, full report

● Audience:

• Mission Front Office (Mission Director, Deputy Director)

• Technical Teams

• Program Office

• USAID/W Counterparts

• Senior, Mid-, and Entry-Level colleagues

• State Department Colleagues, including Public Affairs Section (PAS)

• Partners

● Timing: How often? Interim reporting through quick emails is often recommended for USAID/W and State Department PAS. As well, a full report on the outreach activity of a Mission at one-year intervals is valuable at the time for historical/institutional knowledge.

● Next Steps: Request feedback to help inform a more focused, better targeted PMP. Then archive the information appropriately so incoming DOCs can be aware of past performance of outreach activities in the country.

EVALUATION OF OUTREACH ACTIVITIES: BASICS

The best partner to performance monitoring, of course, is evaluation. Evaluation can pick up where performance monitoring leaves off generally. It enters the picture to answer:

● Why did results meet, fail, or exceed expectations?

● What factors are causing these results? The activity itself? Or are there other factors to consider?

● Can these results be sustained?

● How can we sustain them?

Evaluation is: "A relatively structured analytical effort undertaken to answer specific program management questions—to gain insights and reach judgments about the effectiveness of program implementation and activities, the validity of the organizational strategy, and/or the impact of the program on major intended results." It usually is undertaken by an objective third party for the full review of information collected through the PMP and other processes. Upon review, the evaluation team could then make recommendations to help shape continuing outreach activities and inform decision making across the board.

For communications purposes, performance monitoring spotlights the strong and potentially weak areas of outreach efforts. An evaluation is part of a continuum which provides additional information beyond the input, anticipated outcomes and actual impact. With outreach and communications resources limited, the Mission may choose to focus more on performance monitoring activities and the actual implementation of outreach efforts rather than spending funds on a full monitoring and evaluation approach for everyday activities.

One note: For paid media outreach efforts, it is the USAID model that the Mission pursue a full performance monitoring and evaluation process, including pre- and post-campaign polling and focus groups. This ensures that data collected is properly evaluated for better understanding of results and actively shows if there are indeed increases in awareness or favorability levels, depending on the objective of the campaign. As a general rule, U.S. funds spent on paid media outreach efforts *must* be carefully monitored and evaluated.

See the box on the following page to better understand the line that exists between performance monitoring and evaluation for USAID purposes.

TWO SIDES: MONITORING AND EVALUATION FOR OUTREACH ACTIVITIES

Performance Monitoring	Evaluation
May be performed by USAID Mission	May be undertaken by an objective third party within or contracted by USAID
Records comparable results	Analyzes recorded results for why they were or were not achieved and may collect new data needed to explain the results
Continuous and systematic collection of data	Periodic review of collected and completed data
Focuses on intended results	Explores intended and *unintended* results
Adheres to the Mission communications strategy, including objectives and activities. Reports out progress of activity.	Provides lessons learned and recommends adjustments to improve achievement of results and objectives.

THE USAID MISSION PMP TEMPLATE

The template on the following pages is provided as a guide for outreach activities. Each field is completed with general terms and should be carefully developed to meet your specific Mission's needs per the steps described above. To be clear, this is a PMP guide. Therefore not every field will be the same for every Mission.

DRAFT PERFORMANCE MONITORING PLAN
Development Outreach and Communications

Communication/Outreach Objective: Increased awareness and/or knowledge of US foreign assistance/USAID activities in Country X

Result: A USAID Mission which promotes communication and outreach

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
USAID/Mission Communications Strategy is completed and updated annually	A USAID Mission communications strategy written and approved by USAID (and the Embassy) which properly identifies messages, tactics and audiences Strategy is also reviewed by USAID/LPA Unit: NA	USAID Communications Strategy	Review strategy status at beginning of fiscal or calendar year	Annually, at beginning of fiscal or calendar year None to Low	DOC
Degree to which USAID Communications Strategy is implemented by USAID and implementing partners	The degree to which the strategy is being followed in terms of audience outreach, budget, messages, tools, etc. as defined in the strategy by both USAID and partners which have been identified in the strategy Unit: NA For consideration: On	Milestone chart listing all tasks and indicating whether they were completed or not	Assign weights to task (example: 5 points for very important) in completion of milestone chart	Quarterly, at end of quarter None to Low	DOC

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	a scale of 1 to 5 with 5 being the highest rating or very well implemented, somewhat implemented, etc.				
Amount of time USAID commits to communication and outreach activities	Percentage of time per month that Mission devotes; most Missions now employ a full-time DOC Unit: percentage	Mission Director monthly calendar USAID monthly calendar	Monthly analysis	Monthly; at beginning of subsequent month None to Low	DOC
Degree to which USAID DOC is fully integrated into senior USAID management team (Note: Is this data collection useful? For what purpose?)	Analysis concerning DOC's role in senior management decisions concerning communications and setting overall direction for Mission; also does DOC report to MD and/or sit in on senior team meetings? Unit: could be measured on a scale of very, somewhat, not very, not at all	Job description coupled with selective interviews	Analysis of job description coupled with selective interviews which measure integration of DOC into team, including 1) does DOC sit in on senior team meetings 2) does DOC provide overall policy guidance on communications, etc.	Quarterly or Annual None to Low	
Degree to which different program offices regularly provide requested information for outreach events and	Analysis concerning program office contributions to communication process, including	Quantitative or qualitative review of information provided; could disaggregate by communication tool as	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
materials — * Note: DOC should clearly define what information requests are made (data, program details, etc.)	information for fact sheets, website, events, social media Unit: could be measured on scale of very often, somewhat often, not very often, never Unit: Could be measured on a scale of very often, somewhat often, not very often, never	definition indicates			
Degree to which program staff participate in communications and outreach events and activities	Analysis of the degree to which selected USAID staff participate in outreach events Participation can be defined as a speaking role; technical brief; site visit or speaking on the record to the media Events include speeches, ribbon cuttings, CODELs, site visits, etc.	Annual tabulation of events and staff participation or random sample of events; could be done in collaboration with program offices	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	Unit: Could be measured on a scale of very often, somewhat often, not very often, never				
Degree to which USAID Mission Director and/or Deputy Mission Director participate in outreach events	Analysis: Same as above Unit: Same as above	Annual tabulation similar to above	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	
Degree to which specific development and foreign assistance messaging is incorporated into USG events/remarks/products in country	Analysis of the degree to which US foreign assistance messaging is incorporated into overall USG events Unit: Could be measured on a scale of very often, somewhat often, not very often, never	Specific review of speeches, fact sheets, website, social media messaging, etc.	Monthly analysis	Monthly	
Result 2: Increased citizen awareness/expanded citizen knowledge of USAID activities					
Amount of USAID issued press releases which are printed in targeted publications	The extent to which USAID issued press releases are printed in whole or in part, or result in a subsequent news story, in the targeted publications Will also need to define whether implementer-	Quantitative and qualitative review of targeted newspapers and publications, disaggregated by newspaper, magazine, and Internet, etc.	At the end of every month, a full review of publications, for instance, would occur with a full list of USAID press releases issued by date and topic Implementers could also track and provide	Weekly or Monthly Low to Medium	Please note if USAID is not permitted to issue releases and/or if they are only issued through the U.S. Embassy

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	issued news releases which mention USAID are included in tabulation Disaggregated by media type (radio, newspaper, magazine, tv, website) Unit: percent as measured by total number issued per total placed by media outlet		information to USAID Analysis may include not only numerical count/percentage increases but also accuracy, etc.		
Percent of target audience with increased awareness of USAID or USAID activity from news coverage generated by press releases * Note: Should probably only measure USAID awareness since respondent could be aware of activity but not the fact that it is funded or implemented by USAID or USAID implementing partner	The extent to which the targeted audience has increased awareness of the USAID activity or program; the target audience is defined in the communications strategy Unit: percent	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Initial baseline survey to be followed by polling at set time of implementation of strategy (for instance: after implementation of paid media campaign)	Two times/year Medium to high	
Amount of USAID fact sheets distributed to	Total number of USAID-issued fact	Quantitative summary of fact sheets by topic	Quarterly review of fact sheet inventory at	Quarterly	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
target audiences	sheets (could also include implementer issued) disaggregated by topic and/or target audience Unit: Numerical with percentage comparison to previous quarter	and/or target audience	end of quarter	None to Low	
Percent of target audience with increased awareness of USAID or USAID activity from distribution and "consumption" of fact sheets	The extent to which USAID-issued fact sheets increase awareness of target audiences defined in communications strategy Unit: percent	Survey data from random sample survey at locations Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Short survey of random sample of citizens at key locations where fact sheets are distributed on at least 2 selected days of the quarter Polling and/or focus group question on sources of information about USAID and increased awareness	Quarterly Low to Medium Medium to High	DOC or implementing partner
Amount of USAID news events/news conferences conducted	Total number of USAID organized news conference Could also include news conferences conducted by Embassy in which key USAID initiative is the focus; and/or implementer-	Quantitative summary of news conferences; could disaggregate by topic	Quarterly review, at end of each quarter, of total	Quarterly None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	organized events Unit: Numerical with percentage comparison to previous quarter				
Percentage of target audience with increased awareness of USAID or USAID activity from news events/news conferences	The extent to which USAID news conferences increase awareness of target audiences defined in communications strategy Unit: percentage	USAID-issued survey Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Short survey to randomly selected participants or exit evaluation at news conference Polling and/or focus groups question on sources of information about USAID	Quarterly, at end of each quarter None to Low Medium to High	
Amount of USAID produced radio spots produced and aired	Total number of USAID-produced radio shows or PSAs Unit: Numerical with percentage comparison to previous quarter	Quantitative summary of radio shows by topic and/or target audience	Quarterly review at end of each quarter of radio spot inventory	Quarterly None to Low	
Percentage of target audience with increased awareness of USAID or USAID activity from radio spot	The extent to which USAID-issued radio spots increase awareness of target audiences defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Polling and/or focus group question on sources of information about USAID and increased awareness	Two times/year Medium to High	
Amount of USAID television ads or PSAs which are developed	Total number of USAID-funded/produced	Quantitative summary of TV ads or PSAs by topic and/or target	Quarterly review at the end of each quarter of ad or PSA	Quarterly None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
and/or aired	television ads or PSAs aired Unit: Numerical with percentage comparison to previous quarter	audience	inventory		
Percentage of target audience with increased awareness of USAID activities from television ad or PSA	The extent to which USAID-issued TV ads or PSAs increase awareness of target audiences as defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Same as above	Two times/year Medium to High	
Amount of USAID produced newspaper advertisements or inserts which are developed and/or printed	Total number of USAID-newspaper ads Unit: Numerical with percentage comparison to previous quarter	Quantitative summary of newspaper ads; could disaggregate by topic	Quarterly review at the end of each quarter of newspaper ad inventory	Quarterly None to Low	
Percentage of target audience with increased awareness of USAID or USAID activity from newspaper advertisement or insert	The extent to which USAID-issued newspaper ads increase awareness of target audiences defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Same as above	Two times/year Medium to High	
Increase in # of YouTube followers	Total # of YouTube followers on USAID/Mission created YouTube site	Quantitative summary	Account review	Monthly	
Increase in # of Twitter	Total # of Twitter	Quantitative summary	Same as above	Monthly	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
followers	followers on USAID/Mission created Twitter account				
Increase in # of Facebook fans	Total # of Facebook fans on USAID/Mission created Facebook page	Quantitative summary	Same as above	Monthly	
Result 3: Increased institutional and financial support					
Percentage of overall Mission budget devoted to USAID outreach and communications activities\n\n* Note: What is ideal percentage – does Agency have a target amount for Missions?	Annual budget devoted to USAID communications and outreach activities, products and initiatives; could also include program funds which are devoted to outreach activities\n\nUnit: Percentage as part of overall USAID Mission budget or percentage as compared to previous fiscal year	Annual budget or specific communications budget	Annual review, at beginning of fiscal year	Annual\n\nNone to Low	
Extent to which communication funding has increased over set time period	Determination by yearly review which tracks funding increases, not solely limited to salaries\n\nUnit: Overall $$ amount compared to previous fiscal year	Annual budget or specific communications budget	Annual review, at beginning of fiscal year comparing to previous year/s	Annual\n\nNone to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
Result 4: Enhanced flow of information to target audiences regarding US foreign assistance					
Extent to which regular (define) updates of USAID website occur	Extent to which updated information on USAID activities and programs is regularly provided through website Unit: Regular updates as defined by DOC occur	Develop and review of quarterly status report which would track uploading of new information; could disaggregate by topic, etc.	At end the end of each quarter, review status report	Quarterly None to Low	
Percentage of target audience which receives information from USAID website	The extent to which USAID website increases awareness of target audiences defined in communications strategy Unit: percent	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Initial baseline survey to be followed by polling at set time of implementation of strategy	Two times/year Medium to High	
Extent to which new outreach, media and social media products are developed and distributed by USAID * Note: Must define products – webcasts, podcasts, blog entries, for instance	Extent to which new outreach products which have not previously been used and developed by USAID are developed Unit: Yes – would mean that new products have been developed	Quarterly or annual summary, disaggregated by product type	Summary of new outreach products developed at end of each quarter or fiscal or calendar year (social media tools, etc.)	Quarterly Medium to High	
Regular information provided to portals,	Degree to which regular and timely	Quarterly or annual summary,	Summary at end of quarter or	Quarterly or Annually	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
blogs and other communication mediums	information is provided to (and potentially posted) portals and blogs	disaggregated by topic	fiscal/calendar year	None to Low	
Frequency of USAID Mission specific mentions on USAID Impact Blog, Frontlines, USAID website, etc.	Extent to which updated information on Mission specific activities and programs is published on/in any of the following: USAID Impact Blog Frontlines USAID website	Publications, etc.	Quarterly review of publications, website	Quarterly	

Developed: March 2008 by Ellen M. Yount, Consultant/MSI
Updated: May 2011

REFERENCES FOR DOC PMP DEVELOPMENT

USAID Guidance

● ADS: Chapters 200-203

● TIPS No. 6: Selecting Performance Indicators

● TIPS No. 7: Preparing a Performance Monitoring Plan

Books

● Watson, Tom and Noble, Paul, *Evaluating Public Relations: A Best Practice Guide to Public Relations Planning, Research, and Evaluation*. Chartered Institute of Public Relations. Kogan-Page. 2nd Edition 2007.

● Bamberger, M, Rugh, J, and Marby, L. *Real World Evaluation*, Sage Publications, 2007.

Related Surveys

● Gallup World Poll: www.gallup.com/poll/WorldPollChannels.aspx

● Pew Global Attitudes Project: http://pewglobal.org

● World Public Opinion: www.worldpublicopinion.org

● CFR: www.cfr.org

● Terror Free Tomorrow: www.terrorfreetomorrow.org

● IRI: www.iri.org

● NDI: www.ndi.org

● U.S. Department of State/INR: *www.opensource.gov*

See Chapter 5 for more online resources.

REAL WORLD EXAMPLES: PERFORMANCE MONITORING

Case Study #1: Media Monitoring in Peru

In Peru, a key audience for the USAID/Peru Mission includes community influencers, especially the media. In order to understand the use of USAID outreach efforts to gain media attention and the reaction the media has toward USAID in general, the Mission created a media monitoring grid. This grid, shown in part below, is an effort taken by a three-person team, including the DOC. The daily information is gathered typically by a program secretary and all are aware of what the Yes/No designations mean. As you see, the grid allows for information to be

captured about general publication and article information, whether it refers to a USAID program and if so which one. It also captures:

● If USAID is mentioned or not

● How the article was generated? Press release, press briefing, paid media, advertisement, etc.

● How does it rate? Based on pre-agreed upon indicators and definitions of what makes coverage low, medium, or high or how to determine if the article is a 5 (positive) or 1 (negative) in terms of tone toward USAID/USG.

The team reviews this data regularly to help target media venues and how to present information to the media.

Nob	Date Pub.	Title / Short Description of Coverage	SO	Media*	Media Name	Author	USG Press Release? (Y/N)	Press Brief session? (Y/N)
1	10/3/2006	"Más de 3,000 familias ex cocaleras de Tocache serán beneficiadas con programas de desarrollo integral"	ADP	AGENCY	Andina	N/A	Y	N
2	10/3/2006	"Lanzan programa de desarollo integral en Tocache"	ADP	N-PAPER	El Comercio	N/A	Y	N
3	10/4/2006	"Reemplazan cocales en Tocache"	ADP	N-PAPER	La República	Maria Elena Hidalgo	Y	N

USAID Paid Coverage ? (Y/N)	Advertisement? (Y/N)	USG/USAID mentioned? (Y/N)	Level of Coverage (L/M/H)	Positive? 1-5 1=negative, 5=positive	Regional (R) National (N) International (I)	Comments
N	N	Y	M	4	N	N/A
N	N	Y	M	4	N	N/A
N	N	Y	H	5	N	Mencionan Gobierno Americano no USAID

Case Study #2: On-Site Survey

In 2008, USAID/Jordan conducted a grassroots-like outreach campaign that focused upon community outreach. For months, the staff, with the help of a contractor, held events at daycare centers, medical clinics, and other locations where they provided modest grants to community, youth, and women groups. The effort focused on informing these audiences about the U.S. partnership with Jordanians.

During one university event, more than 1,000 students perused displays, workshops, and lectures set up by USAID. The Mission used this opportunity to monitor its performance through a simple questionnaire. At the beginning of the event, students were asked about their awareness levels of USAID and about their favorability to it. After the event, a survey was again taken using the same questions, such as: Are you familiar with the United States Agency for International Development or USAID? Or what is your opinion about USAID? As some would predict, the numbers showed that awareness levels of USAID and its funding increased. As displayed in this example below, the questionnaire also asked about the opinion of the person regarding USAID—pre-event and post-event.

After the survey results were reviewed, the Mission would then need to answer if the results met their performance indicator and target from the PMP. This allowed them to understand if the event was worth the effort given the changed favorability to USAID. It would not let them understand why the change of favorability occurred; this would require further evaluation.

Chart 1. What would you say is your opinion of USAID?

DRAFT PERFORMANCE MONITORING PLAN
Development Outreach and Communications

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection

Chapter **15**

Shooting Video in the Field

Author: Gregg Rapaport

Contents

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Shooting Video in the Field

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VIDEO'S ROLE IN STRATEGIC COMMUNICATIONS

Video is a powerful medium that allows you to tell USAID's story vividly—to literate and illiterate audiences alike. It can be distributed in a variety of ways including broadcast television, websites, social media platforms, and outreach events.

You should produce video materials to help your Mission achieve its strategic communications goals and objectives as specified in the Mission's communication plan. In today's fast moving media environment, it is difficult to imagine a plan whose implementation would not benefit from the inclusion of video tactics.

Producing in-country video is also appropriate to support Agency communications around "centers of gravity," or areas of focus such as global health, food security, and climate change. Timing your deliverables to correspond with the thematic calendars of FrontLines and the IMPACTblog (which have large readerships) will help the Agency more powerfully tell its story with in-country examples, and will raise the visibility of your Mission's activities on the domestic and international stage.

Up until recently, the production and dissemination of professional-grade video content required hiring specialists, and allocating significant time and resources for the completion of video projects. Today, with affordable and user-friendly high definition (HD) video cameras, free or low-cost editing software, and online distribution platforms, it is possible to shoot, edit, and publish video quickly with no outside support. When the Agency distributed a Flip camcorder to each Mission in 2010, all cost barriers to field production of video content were removed.

CHOOSING A VIDEO PRODUCTION APPROACH

Making a video "from A-to-Z" using the Agency-supplied camera/software is quick and easy, particularly when you want to capture just a few different clips to make a short

Web video is a global phenomenon:

• YouTube is localized in 25 countries across 43 languages.

• 70% of YouTube traffic comes from outside the U.S.

• YouTube reached over 700 billion playbacks in 2010

Source: youtube.com/t/press_statistics on 5/5/11

movie.

However, it's important to note that the Flip's inherent capabilities are basic. The limited editing capability is insufficient for creating longer videos or achieving higher levels of production value because:

● the camera has no plug for an external microphone,

● audio and video can not be separated (or layered with additional tracks) within the editor,

● the editor is not designed to work with more than a small number of clips,

● it is not possible to generate graphics within the editor that comply with the Graphics Standards Manual, and

● it is not possible to generate captioning within the editor.

Consequently, it is important from the start to have a clear understanding of: your desired deliverable, whether more advanced camera and/or editing software is available or can be purchased, the level of technical and creative involvement you are able and willing to bring to the table, and the level of funding available to hire an outside video production vendor to support the project.

There are basically three approaches from which you can choose, as a result of doing the above analysis:

1. **Full-Cycle Approach:** Shoot and edit the video from start to finish.

2. **Front-End Approach:** Shoot only and leave the editing to a vendor.

3. **Management Approach:** Outsource all aspects of production.

Regardless of the approach you choose, the information in this chapter will help you create more informative, engaging, and visually sophisticated video products. This will remain true even if you opt for the outsource approach. You still need to communicate instructions in the RFP, and interact with those doing the hands-on work throughout the execution of the contract.

PREPRODUCTION

VIDEO REPORTING VERSUS VIDEO STORYTELLING

Armed with a camera, you can be one of two types of videographer:

● one who records and reports (your aim is to capture events as they unfold and provide an accounting to your viewers), or

> Missions can produce field-video even with limited resources.

● one who tells a story (your approach is equally truthful, but carries an obvious perspective, and is put together in a scripted way).

You might think of the distinction as the difference between a newspaper article and an editorial. One is not recommended over the other, and there is a good chance you will be making both kinds during your tenure at USAID. However, if you are "reporting," note that not all the preproduction steps below will apply.

GENERATING EFFECTIVE VIDEO REQUIRES UP-FRONT ANALYSIS

At the very inception of a video project, you will want to tackle these questions:

● Who is your audience?

● What do you want them to know/understand?

This is no different than when you sit down to write a press release or speech…it's about strategic communications, not communications just for communications sake.

Next, determine:
● What story can be used as the vehicle for the information/message?

Choose one that you can realistically (vis-a-vis the resources) be made into a video given the approach you have selected. The "best" choice might not be the viable choice, unfortunately.

And then, think through:

● What images can tell the story in a clear and compelling way?

A VERSATILE USAID VIDEO TEMPLATE

Most any USAID development video (regardless of topic) can be made by explaining the:

● **PROBLEM**

● **USAID-SUPPORTED INTERVENTION** (i.e. program or activity)

● **IMPACTS**

This three-part progression is informative and provides a clear arc that will carry the viewer along. By adding bookends that provide overall context and reinforce USAID branding, we end up with a truly strategic video template:

1. USAID FRAMING—e.g., USAID has been a partner of the X-people/ government for Y-years working to eradicate poverty…

2. The PROBLEM—convey who is affected, how they are affected, and how big

The video creation process can be thought of as three equally important, sequential phases, starting with pre-production.

the problem is

3. The USAID-SUPPORTED INTERVENTION—explain what is being done and where it is happening

4. The IMPACTS—official statements are made increasingly credible with beneficiary interviews and statistics

5. USAID FRAMING—e.g., USAID hopes to leverage X-achievements to date, which gets Y-country close to meeting the MDGs, and we see continuing partnership with the Y-people/government as the path forward…

SCRIPTING

There is no one way to tell a video story, and as you become more experienced you will likely try different approaches, but it is suggested you start the actual work of making a video by writing a voiceover track. Imagine addressing a radio audience who must understand everything in the above template simply by hearing your voice. When you feel that you have gotten to a solid draft, read it out loud and time yourself. Then edit and re-edit the script as many times as necessary until you can read the script in less than three minutes. The reason to do this is you want to end up with a finished video of no more than five minutes, and your video will be longer than the read-only time. In the editing process, you may be substituting or adding on-camera interviews, on-camera narration, and/or visible text for sections of the voiceover.

STORYBOARDING/CREATING A SHOT LIST

The next step is to take the script and return to the question, "What images can tell the story in a clear and compelling way?"

Imagine the shots you need to visually tell the story, scene by scene. Draw up a storyboard (http://portal.usaidallnet.gov/documents/2944) showing the images that correspond with the words in the script. You might alternatively write a shot list (http://portal.usaidallnet.gov/documents/2945). Avoid a string of interviews with USAID leadership, government officials, program officers, and beneficiaries. Talking heads make for uninteresting video. While eliminating talking heads entirely is not suggested (i.e., you certainly want to hear from beneficiaries), try to find ways of showing something rather than having someone on-camera talking about it.

Think about a variety of images: outdoor and indoor settings, people and animals, activities and inanimate objects, the "big picture," and up-close details.

You will take the storyboard or shot list you create with you the day of the shoot and check off each shot as you capture it. This does not preclude you from getting opportunistic shots; to the contrary, you certainly want to be capturing documentary

You can tell a wide range of USAID stories through video using a five-part template.

footage, but making sure you get the shots you envisioned, at a minimum, will make the editing process significantly easier and faster.

PREPARING QUESTIONS FOR INTERVIEWS

It is recommended that you write down questions during the preproduction phase that you expect will provide the verbal answers from interviewees that can be substituted for voiceover in the script.

The exact questions you will ask interviewees will, of course, be based upon your video's topic, the program/project, and the specific people, but here are just a few categories of questions you might want to explore with beneficiaries, in particular:

- background of "the problem" from the interviewee's perspective

- what the interviewee expects from the program

- the activities the interviewee has participated in

- a description of the location where the activities take place

- observed community-level impacts

- personal and family-level impacts

Ensure that the wording of your questions will not result in a "yes or no" response.

MAKING A MASTER SCHEDULE

Making video is not something you should try to do "when you have time" or as an add-on to a regular site visit. It is best to consider your effort as a stand-alone project and estimate the amount of time needed for preproduction, production, editing, and distribution—and then schedule it out.

Here are some time-consuming issues to consider, in addition to the obvious ones, when making your master schedule:

Pre-production factors:

- putting together and pitching USAID officials/staff and getting Mission approval

- procuring equipment and learning how to use it, or going through the contracting process if you are using a vendor

- getting input from program and/or partner staff during the scripting and storyboarding phase on who you can talk to and what you can see at various sites, and discussing the logistics involved in getting there

- coordinating with the availability of program/partner staff who will go with you

or meet you

● coordinating with the schedule of the site activities...you want to be there on a day when something is happening with beneficiaries…and that something should be visually interesting

● coordinating with other stakeholders you may invite such as the PAO and/or a journalist

Production factors:

● relationship-building at the project site with partners

● explanation to all relevant stakeholders onsite about the filming activities

● initial walkthrough to get a sense of the site

● shooting b-roll (that you don't already have on your storyboard)

● downloading footage off the camera to a laptop before editing

Also, allow time for the unexpected. Something always happens that you didn't plan for!

IT'S HARD TO BE A ONE PERSON BAND

Going to a site and shooting a video by yourself is do-able, but a coordinated team of two or three is preferred. The optimal set up is to have one person operating the camera and any other equipment, a second serving as the interviewer, and a third (unless you speak the native language yourself) serving as translator. Often times a program officer or a member of the partner staff can act as translator, or interviewer/translator (following your questions while you operate the camera). Make sure you explain your staffing preferences when getting Mission clearance.

PRODUCTION: EXECUTION AND MANAGEMENT

ARRIVING AT THE LOCATION

It is helpful to have done a scouting trip to the site beforehand, but sometimes you will arrive the day of the shoot not knowing what to expect or who you will be meeting. Regardless of how well–acquainted (or not) you are with the project/partner staff at the site, you will want to exchange greetings quickly —in accordance with in-country customs and traditions— and "get down to business." You will need all the time for the production that you can get. If you happen to wrap-up before the scheduled time, that's when you should talk about contractual, branding, or other

issues that exist between the Mission and project.

Bring together all the relevant stakeholders and explain what you are there to do. Depending on the size and number of people at the site, you will want to make sure you either directly or indirectly communicate with everyone that may be impacted by your filming activities. There are three principle reasons to do this:

1. Some beneficiaries do not want to be filmed, even as part of a group, and you want to identify them before filming and abide by the highest standards of professional ethics in selecting how you frame your shots.

2. People running around with video equipment draw attention the world over, whether at a public event in Washington D.C.; a souk in Rabat, Morocco; or a farm in Arusha, Tanzania. For your purposes, you want people to carry on with whatever they were doing before you pointed a camera at them. So you need to instruct those who will be in a shot to "just ignore me…I'll be walking around for a while." Perhaps offer, "I'd be happy to show you some of the footage after I'm done." Doing so decreases the odds that they will swivel their heads or turn around and stare at you while filming.

3. No matter how unobtrusive and uninteresting you attempt to make yourself, if you are in a public or semi-public place you will also possibly draw a crowd of children and bystanders, and they will reliably stand (often as a group) right in the middle of your otherwise well-framed shot. If you have briefed a sufficient number of people ahead of time, you can ask one of them to ask the bystanders to move out of the frame.

Then do a quick walkthrough of the site with the least number of people possible. Your goal at this point is to get a sense of the different locations where you might shoot, and what types of objects are available that you might move from one place to another to create a better "set." It is valuable to do this before people start engaging with you, for it informs the rest of your visit.

LIGHTS…

Understand just one geeky fact about video technology: a camera essentially captures light reflected off of the objects in front of it. If you want to create the best looking video possible, it is necessary to control the amount/direction/quality of light hitting your subject. This is particularly important with regard to interviewees. More light is generally better, particularly for lower-end cameras which tend to generate grainy and flat-looking images in low-light situations (e.g., indoors), and when the reflected light is inadequate to capture an interviewee's facial features clearly on camera. When outside on a bright day you might assume you have "good" light, but this is not always the case. Consider the directionality (i.e., overhead light does not evenly light an interviewee's face) and quality (midday sun is relatively "harsh" compared

to morning or evening sunlight). Making lighting adjustments (with or without equipment) can dramatically change the look and feel of your shot when doing an interview.

How to change a lighting situation > no frills approach

You can control lighting without any additional equipment or accessories whatsoever. Simply change where the subject is relative to the available light source.

Example 1: Ask an officer sitting inside at a desk that happens to be in front of a bright window to stand facing the window instead, so the light coming through the window brightens his/her face instead of silhouetting it.

Example 2: If a farm worker is outside in the midday overhead sun, which will create unattractive shadows on his/her face, reposition her/him in a shaded area where even light will not cause shadows.

Example 3: Relocate someone working in dimly lit room (including any table/ equipment/etc. being used) closer to a ceiling mounted light so there is more ambient light illuminating the worker. This set-up might look odd to you at the moment, but if you frame the shot accordingly, it will look fine on-camera and turn out much better than had you filmed in the original spot.

It is important to remember that as a storyteller, not a journalist, you can take some creative liberties during the filming process.

How to improve a lighting situation > bounce approach

Sometimes you just can't move the subject and don't have auxiliary lights. You may be able to bounce an existing light source to lighten your interviewee's face. There are commercially available reflectors—circular reflective surfaces that fold up into an easy-to-carry bag—but a plain white sheet or large piece of white paper can work as well.

How to design a lighting situation > equipment approach

There are three pieces of equipment you will want to add if possible, when doing interviews.

Key light: This is the principal light source. It may be freestanding or camera-mounted. If freestanding, you will typically place this between 0°-45° facing your interviewee. Experiment as placement will determine the shadows that are created.

Fill light: As the name implies, this fills-in dark areas so you can lighten or eliminate facial shadows. Fill light is a softer light that typically is placed between 0°-45° facing your interviewee, on the other side of the camera.

Back light: Originating from behind the subject (specifically placed above and off to the side of the interviewee), it adds an accent on the person's hair that looks attractive and adds some dimension.

Using a three-point arrangement with key, fill, and back lights is referred to as the "Rembrandt Effect" and is the optimal way to light an interviewee.

If your interviewee is a USAID or partner employee, you should ask if s/he would be okay putting a small amount of cosmetic powder on. Doing so dramatically reduces oily looking skin, glare, and high-resolution detail of skin pores that will be visible when using HD cameras and bright lights. Bringing with you a variety of cosmetics appropriate for different skin tones is recommended.

CAMERA…

Framing

Amateur video makers tend to pull out their camera when they see something interesting, start filming using whatever defaults the camera has, and then turn the camera off until something else seems interesting. As discussed in the storyboarding section, the pro approaches video making very differently. You know what you want to record, you find it or set it up, and then you record it so it looks a specific way.

By adjusting how far you are from the subject and/or using the lens's zoom function, you can frame a shot in many different ways, including those below.

Very long/vista shot: Taken from a hill-top typically, this provides a very broad environmental viewpoint. It adds a nice touch if the location you are in is particularly beautiful or particularly unattractive.

Long/establishing shot: Tighter than a vista shot, this perspective covers the location, people, activities, and objects involved. Establishing shots are used at the beginning of an editing sequence to draw the interest of the viewer and provide context for what follows.

Medium shot: Tighter than a long shot. In interviews, this can be a full-length shot of the interviewee or a tighter version of the head, shoulders, and torso.

Close-up: Tighter than a medium shot. The close-up in interviews can be the head and shoulders, or the head with slight cropping at the top. This shot provides a level of intimacy that is particularly nice when doing beneficiary interviews.

B-roll

B-roll is a catch-all term describing footage that adds another dimension to, or provides further detail about, what is seen or heard in other shots or in the voiceover.

The Deputy Director for Interactive Communications can provide recommendations for specific video equipment/software purchases.

There are no particular rules governing how or when to capture b-roll, and b-roll can have any type of framing. You simply need to be on the lookout for it and get it when you can. Here are just a few arbitrary ways b-roll can be used:

● to show exactly what someone is holding in his or her hands, such as a book

● to see what is otherwise hidden, such as the contents inside of a closed cabinet

● to "meet" a person mentioned by an interviewee but who is not on the set with him or her

● to illustrate visually the voiceover, such as medium or long shots of an activity like farming, voting, teaching, etc.

As becomes clear in the editing process, b-roll is arguably the most important element you need for a really good video, so shoot lots of it! All too often, so much time is spent on interviews during site visits that there is not enough time to also shoot b-roll. Don't let that happen.

Recording Audio

When shooting video, it's easy to find yourself exclusively focused on the visual elements. However, you must also ensure that crystal clear audio is recorded. There is no more frustrating moment than realizing in the editing room that what you thought was a perfect sound bite during the video shoot is in fact unusable.

There are plenty of reasons capturing good audio may be difficult: a soft spoken interviewee, general background din, continual or gusty wind, unexpected noises, getting less from the microphone built-into the camera than you expect, or using an external microphone that is not working. These issues can certainly be addressed, optimally with a combination of equipment and on-site situational awareness that translates into your being a proactive director and cameraperson.

Microphones

There's no need to—and nobody expects you to—carry around a bag full of expensive equipment to shoot short USAID videos. But if you have a budget for in-house video production, the first place to spend some money (several hundred dollars, not thousands) is on a camera similar to the Flip but with an external microphone jack, and an external microphone. The difference in audio quality is substantial.

These are some relevant types of external mics:

Lavalier: This is a small clip-on microphone, attached to a piece of clothing under an interviewee's chin (i.e., to a jacket lapel, shirt, or blouse). It does a great job of picking up the interviewee and limits the amount of other sounds present in

the environment. As long as the interviewer is nearby, the lav should pick up the question as well.

Handheld: Generally this has an omnidirectional pick-up pattern, which captures some ambient sound, but it can be effectively used in a back-and-forth, question and answer fashion. It can also be easily and quickly passed to different interviewees in a group setting.

Shotgun: This is a microphone that captures audio from a V-shaped area in front of the tip of the microphone, and is usually camera-mounted. The big advantage of using a shotgun is it allows you to position the camera far away from the interviewee for visual or logistic reasons (e.g., getting someone's full body in the shot, or having to set-up at the back of a room for a press conference). Similarly, when getting wider shots (e.g., establishing shots), you can capture targeted audio from a distance, as the shotgun can be thought of as having a "zoom-in" capability.

Notes on mics:

● All three of the above mics can (for additional cost) be used wirelessly rather than in a wired manner.

● If using a lav, position it so that none of the interviewee's clothing can rub against or cover the mic if the person moves. You don't want the audio to be scratchy or dull.

● Outside, we grow accustomed to wind noise and do not really hear it in our heads, but on-camera it is very obvious. Use a "wind sock" (a cheap foam cover that probably came with the mic) to dampen the noises created when the wind hits the mic. In many cases where a sock is not used, wind is recorded as loud popping noises and/or huffing or whistling sounds that can overwhelm a person's voice, making the person unintelligible on the recording.

Audio Levels

If your camera has a jack for a headphone, by all means use it even if all you have are earphones from your mp3 player. At a minimum, this will tell you if the microphone you have plugged in is working correctly (you might have dead batteries, a broken plug, or a loose connection). It also helps you identify background noises that the camera is picking up that you may be "tuning out" personally, so you can do something about it before recording.

Higher-end cameras may also have adjustment dials to increase or decrease the signal from the mic. Do a sound check with the interviewee, adjusting the level while s/he speaks, per your camera's instructions.

<u>Find an Audio-Friendly Location</u>

As mentioned in the framing and lighting sections, you need to find a spot with good lighting and a visually contextual background for an interview. The location also should be analyzed for its audio qualities, which are particularly relevant if using only a built-in camera microphone. Avoid noisy areas where people are talking, machinery is being used, or there is traffic nearby.

Right before you start recording, take the following steps:

● Instruct everyone to turn off their cell phones

● Instruct everyone to refrain from having side conversations

● If someone on your team is planning on taking pictures during the interview, make sure s/he has turned off any beeping functions and any artificial shutter release sounds on the camera

…AND ACTION!

You've done all the preproduction. You're on site and the camera, lighting, and sound equipment is up-and-running. Now you can hit record and take it easy, right? Unfortunately, no. The act of filming requires you to be "on your toes." But the good news is it can be a great deal of fun. In addition to what we've covered already, here are some of the issues you'll need to address once the camera is rolling.

Rule of Thirds:

Professional photographers have long used the "Rule of Thirds" to compose their shots, and the same technique works in videography. Mentally break the frame into thirds, both horizontally and vertically (some cameras present the option to superimpose these lines on the viewfinder). Put the most important elements on the intersections of the dividing lines.

Particularly when shooting interviews, put the subject's eyes where the horizontal and vertical lines meet. Research proves that viewers focus on those areas of the frame, and the resulting "eye-to-eye contact" between the viewer and person on-camera adds a powerful humanizing aspect.

Zooming, Camera Angle, and Camera Motion

There are other ways to control a shot in addition to framing. Deciding what to do depends on what you want to accomplish and your own artistic sensibilities.

● You can zoom in on a subject to show more detail, or zoom out from a subject to show the environment around the subject.

● Positioning the camera low to the ground and pointing it up, or positioning it high and pointing it down creates visual tension and interesting points-of-view.

● You can also move the camera to create motion that is pleasing to the eye and may provide more information to the viewer than a static shot would. Here are some shots to experiment with:

● Tilt up/tilt down

● Pan left/pan right

● Glide the camera by something/someone (e.g., walking fast with the camera pointed perpendicular to the direction you are walking, or pointed out the window of a moving vehicle)

● Glide the camera in a straight line toward or away from something/someone

Motion in the Frame

It takes discipline at first, but try not to track a moving person in your shot with the camera (unless there is a reason to). Rather than keeping the person always in the center of the shot, it is far more interesting to let the person walk through the frame from right to left, or left to right.

Branding in the Frame

Get something that visually communicates "USAID" in the frame. This could be a sign on a wall, or marking on a box or bag. <u>Bring USAID-branded stickers with you and use them on appropriate items, as necessary.</u>

If you are interviewing a USAID employee, if they are not wearing one already, place a USAID lapel pin on their jacket, a USAID cap on his/her head, or ask them to put on a USAID shirt. <u>Be sure you are carrying these branded items when you go to a shoot, as well.</u>

If you think the USAID employee's clothing or jewelry would send the wrong message in the context of the video, ask them to adjust or change their clothing, or take off jewelry. By being on camera, they represent USAID and influence viewers' perceptions of the Agency by how they look, as well as how they act and what they say. Also ask the interviewee to remove any visible badge and/or lanyard, as they create visual distractions.

General Tips

● After finishing one scene and before moving to the next scene, be sure you've gotten:

- a person,

- the place,

- some activity, and

- b-roll.

You may not use all the footage, but the "more the merrier" should be your motto, as having options when you start editing makes the job easier.

● For particularly interesting visuals, take a variety of clips of the same thing from different vantage points. During the editing process, you may find you like one much better than another.

● Make sure even simple b-roll shots are at least 10 seconds long. This is because if you add a fade to both ends of the clip during editing, your net on-screen time for the shot could be only a few seconds.

GETTING THE MOST OUT OF THE INTERVIEW

There are at least three types of people to interview for a USAID video:

● USAID staff

- Partner/Program staff

- Beneficiaries

When you first meet the interviewee, thank them for their participation and get the interviewee's express consent (or the consent of a minor's parent). Standard forms can be downloaded from http://portal.usaidallnet.gov/documents/2946 and http://portal.usaidallnet.gov/documents/2947. Note that some interviewees may be illiterate. An "X" on the form and an on-camera statement from the interviewee—with his or her name and that s/he understands the interview is being videotaped and may be used in a public video—is a reasonable substitute. Note that during editing, you will need to put the interviewee's name in a lower-third slate, so now is the best time to get assistance with the spelling of the person's name if you do not speak the native language and the interviewee did not write it on the form.

Because interviewees often speak in run-on sentences, you'll need to coach them (perhaps repeatedly) to optimally speak in one sentence answers. The goal is to get "sound bites," after all. This is harder than it sounds, however, and often requires you to shoot many takes. This in turn can be frustrating or confusing for the interviewee, so tell him/her that you will often ask them to answer a question several times. If you feel comfortable saying something self-deprecating (you want them to understand it's not because they're doing something wrong), it's the perfect way to segue into the interview as it may make them laugh and see you as less intimidating.

Warm the interviewee up with simple questions about themselves, such as:

- Where are you from?

- How large a family do you have?

- Are your family members here today also?

- What are their names?

The answers may be useful to you in the later stages of the interview, but the primary purpose is to get the interviewee to relax and speak freely.

During pre-production when you originally drafted interview questions, you ensured that the wording of your questions would not result in a "yes or no" response, but be on the lookout for these type of responses nonetheless. Right before asking the first question, it is helpful to instruct the interviewee to incorporate the question into his or her answer. This is to provide context for the viewer as the question will be edited out in the final video. For example, if the question is, "Has your income gone up since participating in the USAID-funded project?" it would be best if the response was "My income has gone up since participating in the USAID-funded project because…," rather than "Yes, it has."

Here are some other tips:

● The interviewer should be off-camera, standing behind or immediately next to the camera (unless you plan to show a question and answer sequence in a video reporting style piece). This is because it looks strange in the final clip to see the interviewer staring at the interviewee once the question is edited out in a video storytelling style piece. Also, it looks better to have interviewees looking more-or-less in the direction of the camera, and they will look at the interviewer as a general rule.

● That said, interviewees will often look at those people they know (such as program/project staff), so if any of these people are off to the side on the "set," your interviewee will look away at random moments during the interview. To prevent that, have everyone on-set standing behind the camera.

● An interviewee might blink or close her/his eyes just at the beginning of answering a question. This is not a problem in a longer format question and answer format (again, as in a video reporting style piece), but will be a problem if you want to pull it as a sound bite. In this case, ask the interviewee to look right at you and quickly ask the question again. Holding up your palm is a good trick to give them something to focus on.

● To get sound bite type answers, as mentioned, you will need to ask the same question several times. While it's best to get one coherent and comprehensive answer, if after three or four tries that seems unlikely, take a different approach. Ask the interviewee to give very focused answers to a series of even smaller questions. You may be able to piece them together in the edit. While conducting the interview, you have to be very aware of what you need for the edit, which is different from actually engaging in a dialogue with the interviewee.

● When you switch to a new question, change the framing of the shot. The easiest way to do this without interrupting the flow of the interview is to simply tighten up the shot a bit with the zoom. Using different framing with the same interviewee makes for a more interesting edit.

Interviewing Non-English Speakers for Flip Editing: Interviews with non-English speakers require a deliberate approach during the filming process if you are going to edit using Flip software or another basic editing software package that does not allow you to record an audio translation over what someone is saying, or put subtitles on the screen. While you could record the translator either off-camera or on-camera (while the interviewee just stands there), these would be visually strange and boring in the edit. It is best to do something else so the viewer knows what is being said.

To overcome this challenge:

1. ask the question in the native language via a translator (it doesn't really matter if the camera is running),

2. have a native language speaker provide the translated answer, and then

3. put an English-speaking presenter (which could be you) on camera describing what the interviewee said.

It might go something like this...the presenter stands next to beneficiary (whose name is Joe) in the middle of a medical clinic and says:

" Joe recently came down with pneumonia and was critically ill. He came to this USAID-funded medical clinic and received antibiotics, which restored his health. Had he been so sick before this facility was built, he believes he may not have been so lucky as there was no access to medical care or pharmaceuticals anywhere in the area."

By using a presenter, you solve the foreign language problem that would otherwise occur during the editing process, and you have the added benefit of being able to more specifically follow your script/storyboard in that you can consolidate several of the interviewee's statements into a tight message.

MANAGING TAKES AND CLIPS

It is helpful to bring a notepad with you to the shoot. Before arriving at the site, write down the questions to be asked, each on a separate sheet with a sequential number on it. Hold each page as a "slate" in front of the interviewee for a few seconds while filming but before the first take of each question. The benefit of this is when you upload your clips to the editing software, you'll more easily be able to find where the question breaks are by looking at the thumbnails.

MISCELLANEOUS EQUIPMENT

Batteries: It's prudent to expect not to have access to electricity when you go on your video site visit. Even if you are certain your entire shoot will take place indoors in a building that you know has reliable electricity, you may decide to record somewhere that extension cords can not reach or make a last minute decision to go outdoors. Batteries should be considered your only source of power for capturing footage. Additionally, you will need power for other activities like reviewing footage on the camera, and downloading clips to a computer to clear the memory for the continuation of shooting. If you are on a multi-day trip, you should not count on power at your hotel for recharging, either. Estimate the amount of power you need

<u>and make sure you have adequate batteries for the job (consult the owner's manual for how long batteries should last)</u>. Make sure rechargeable batteries are given a full charge the night before you plan to shoot (batteries, even fully-charged ones, lose power gradually over time when stored). If your camera uses replaceable batteries (such as the Flip camera which can optionally operate on AA batteries), bring three times as many as you expect to need. It's better to be safe than sorry.

Tripod: You can shoot an entire video by handholding the camera, but having a tripod is easier on your body and provides better looking shots. If you hand-hold, turn on the image stabilization function on the camera, if available, and/or stabilize the clips in your editing software if that is an option.

Computer and Hard Drive: If you expect to shoot close to the amount of footage your camera can hold, you should bring a computer to download your footage to so you can free up camera memory and keep recording. If you are shooting on a camera other than the Flip, you will want to bring an external hard drive as many video formats used by higher-end cameras create very large files.

PERSONAL PREPARATIONS

On the day of a video shoot, you'll almost certainly get tunnel vision…involved with everything that's going on technically, thinking up new questions to ask interviewees, making mental notes about what b-roll shots you need to get later in the day, and talking to people. You may lose track of time and even forget to take care of yourself.

Consequently, you are strongly encouraged to wear a backpack with the following things in it:

● water and snacks (even if you store water in your vehicle, expect to have access to water at the site, or plan to take a lunch break, it is recommended to carry water, electrolyte packets (e.g., Gatorade), and snacks with you anyway…you may not have time to go to the vehicle, will probably skip lunch, and if you're running around outside on a hot, sunny day then dehydration and low-blood sugar are very real dangers)

● hat and sunglasses

● sunscreen

● long sleeve shirt

POST-PRODUCTION: BRINGING IT ALL TOGETHER

Some of you will use the Flip software on your Mission computer. Some will use

Windows Movie Maker or Adobe Premiere Pro, the two other approved programs for government workstations. Please note that Movie Maker is free, but per the USAID Chief Information Officer, if you do not already have it installed on your computer, you may not download it; Adobe Premiere Pro is commercially available. Others will work off-network on a Mac, using the free iMovie or commercially available Final Cut Pro software.

Still others will be contracting out the editing process to a vendor.

No matter which approach you choose, here are a few best practices that are universally applicable:

● use a sequence of establishing shot, medium shot, and close-up for most non-interview scenes

● during interview sequences, cut from a wider framing to a tighter one sometime after the first question and before the last

● augment your footage, if necessary, with clips from other stakeholders; partners, in particular, may have a deep library of high-quality footage

● add still photos, if necessary, to augment your footage

● keep transitions between clips simple; avoid the bells-and-whistles your editing software may tempt you with

● add text or graphics to present/clarify statistics or data

● reference the latest version of the Graphics Standards Manual at http://www.usaid.gov/branding/gsm.html for guidance on branding of opening and closing slides, lower third slates, titles, and credits; note that the original Graphics Standards Manual covered broadcast video only; the pending update to the Graphics Standards Manual is expected to provide specific guidance on web video, but until its release for web video you should open with a slide of the USAID identity against a white background, and close with a slide of the USAID identity against a white background followed by a slide with credits

● do not use your country's sub-brand in the video; only the official USAID logo is permitted

508 COMPLIANCE

If you are going to host your video on a .gov server, the video needs to be accessible per the rules of "508 compliance," which you can review at http://www.section508.gov/ and http://www.usaid.gov/policy/ads/500/501mad.pdf. This requires either open or closed captioning in English. But as most of you will not be hosting

video on a .gov server, and many will not be using editing software that allows for captioning (e.g., Flip editing software), it makes more sense to discuss the best-efforts approach to captioning (not a requirement but a best-practice) that is enabled by the Agency-approved online distribution platform, YouTube. By uploading a text file along with your video, YouTube converts the text to on-screen captioning. It is free and amazingly accurate, provided the voiceover or interviewee is speaking English and there is not too much background noise or music competing with the audio. There is a manual captioning function in YouTube as well, which can be used when the automatic function does not generate acceptable results, or if you want to use captioning in a different language (for more details, see http://portal.usaidallnet.gov/documents/2943). Note that there is no way to export the version of the video with the YouTube captioning for hosting elsewhere.

DISTRIBUTION

As mentioned in the beginning of the chapter, your video can be cross–purposed and distributed in many ways. Your Mission website is a logical place to present the video (link to where it is hosted on YouTube, using an "exit script" informing the viewer s/he is leaving a .gov site…see page 15 of http://www.usaid.gov/oig/public/fy07rpts/a-000-07-003-p.pdf). Also, you can reach your target audiences via social media platforms, and don't forget to contact all these stakeholders who may have other opportunities for distribution of your video content:

● the social media team in Washington, D.C. (USAID/Washington platforms, iTunes, etc.)

● press officers for regional and programmatic issues (media)

● desk officer, information officer, and bureau communicators (various communications opportunities)

● the Director for Strategic Publications (FrontLines, Telling Our Story)

● the Director for International Communications (various communications opportunities)

CLEARANCE PROCESS

If the video is for in-country use only and will not be hosted on a .gov server, follow your standard clearance process. If the video will be hosted on a .gov server or will be utilized by USAID/Washington (including, but not limited to Agency social media platforms), also submit the video to your geographic strategic lead and any relevant thematic strategic lead/s.

MOVING FILES INTERNALLY

Google Video is now approved for Agency use, allowing you to store and share video files up to 300 MB (currently) with USAID staff around the world.

● Go to http://googlevideo.usaid.gov

● Click the "Upload" tab

● Fill out or adjust the fields and click "Upload Video"

See this post (http://portal.usaidallnet.gov/blogs/grapaport/11/07/05/moving-video-files-usaid) for further information on deciding upon the "owners," "collaborators" or "viewers" category to use for those you share the video with.

MOVING FILES EXTERNALLY

There are a variety of third-party platforms that allow you to share files that are too large to email. Two worth considering are www.dropbox.com and www.yousendit.com.

RESOURCES

● Department of State, IIP: www.socialmedia.state.gov and http://wordpress.state.gov/socialmedia/guides/video

● How to: http://www.usa.gov/webcontent/technology/video.shtml

● Examples of field-produced video that tell the USAID story:

• Tanzania/Feed the Future: http://www.youtube.com/usaidvideo#p/u/0/3fWc1XLvHH0

• Nepal/Global Health Initiative : http://www.youtube.com/watch?v=2yXiddYRY38

• Jordan/Community Water Conservation: http://www.youtube.com/watch?v=f77EpE75Eus

● Tips from Flip: http://www.youtube.com/watch?v=NG1LKJ_ZRrk&feature=channel

● Dozens of other how-to's on the Flip Channel : http://www.youtube.com/user/flipvideospotlight

● General field-video production tips can be found on this third-party site which focuses on creating video for human rights advocacy:

• WITNESS Video Advocacy Training Guide at http://witnesstraining.wordpress.com/

• "During Filming Part 1" at http://blog.witness.org/training-resources/videos-how-to-create-video-for-change/

● YouTube Handbook: http://www.youtube.com/t/yt_handbook_produce

Chapter **16**

Engaging Audiences Through Social Media

Author: Gregg Rapaport

Contents

Chapter **16**

Engaging Audiences Through Social Media

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WHAT IS SOCIAL MEDIA?

Social media is nothing short of a revolution in communications. If newspapers, radio stations, and television channels are a *one-to-many* approach to communications, then social media's *many-to-many* form of communications is something entirely different.

More than 850 people have added to, deleted from, or replaced something in the Wikipedia definition of "social media" since it was first drafted nearly five years ago. You can learn as much about the nature of social media from considering that one tidbit of information as from studying the (still evolving) definition at http://en.wikipedia.org/wiki/Social_media. Here's why…

Social media is made up of several interlocking things:

1. Content: Text, photos, and video created by absolutely anybody, including but not limited to traditional content producers;

2. Technology: Web-based platforms that allow sharing of content in not only a publicly transparent but also massively networked way (so that significant amounts of people, who may otherwise have no connection to one another at all, are on the same page–literally and figuratively); the cost of using these platforms is free or relatively low-cost;

3. Participatory culture: Any of the networked people are allowed and are encouraged to add to an "ongoing conversation;" this might happen through comments responding to posted content, through collaborative efforts as are inherent in the construction of a wiki page, or by adding to the body of aggregated content on a specific topic (as happens when people all use common hashtags on Twitter); the distinction between who the understood publisher and audience is—which is so obvious in traditional media—does not have a meaning here.

> "The new paradigm, particularly for reaching youth, is you have to go to where people already are on the Web. People don't visit you, you have to go to them."
>
> — Department of State IIP Deputy Assistant Secretary Duncan MacInnes, as quoted by The Hill, 4/25/11

4. A real-time environment: Content is released across one or more distribution channels the moment it is completed, any time on any day of the week.

Social media has transformed former media consumers into "citizen journalists," and in some cases, powerful social and policy influencers. In the Middle East (as we have seen during the recent social uprisings) and elsewhere, they operate independently and whimsically and often (intentionally or unintentionally) with disregard of journalistic standards. With integration of social media into traditional media, and traditional media into social media, the nature of news has evolved, but what is even more significant is that social media publishers not only welcome push-back but seek true engagement with others, something that traditional media publishers to not.

This allows you new opportunities as a USAID communicator. You can realize significant value for your Mission and the Agency if you <u>balance listening, learning, and connecting, along with the straight-forward releasing of information.</u>

FIVE IMPORTANT TYPES OF SOCIAL MEDIA

Blog: A "web log," (shortened to "blog") is a collection of posts that is frequently updated and typically includes links to other web content and may include photos and video. Blogging was created approximately 15 years ago with the intention of allowing a person to keep an online diary. Consequently, of all the types of social media that you as a USAID communicator can use in an official capacity, blogging is the one that lets you speak in the first person and express experiences, thoughts, feelings, and opinions (within reason, of course). Corporations blog, non-profits blog, and government agencies blog, but it is still the individual who writes blog content. A blog can be freestanding or part of a website, such as the Agency's IMPACTblog which is hosted on the www.USAID.gov website at http://blog.usaid.gov/.

Microblog: As the name suggests, a microblog is a really small blog, with photos or video included by way of a link, rather than being embedded. Twitter, used by more than 200 million people worldwide, is the official microblogging platform of USAID. The Agency's account is: http://twitter.com/USAID. Over 60% of registered Twitter users are from outside the U.S., making it also the default choice for a microblogging platform to reach in-country audiences.

Photo sharing platform: To manage large amounts of images, online platforms allow for the organization and sharing of photos, and engagement of others in discussion about photos. Flickr is the official photo sharing platform of USAID. Check it out at http://www.flickr.com/photos/usaid_images/. It has tens of millions of users and more than 5 billion photos, and 3,000 more images are uploaded every minute.

"While the blogosphere has not replaced traditional media, it is becoming more firmly entrenched as an information source, and consumer trust in traditional media is dropping."

– Technorati's State of the Blogosphere 2010

Video sharing platform: Online video is the fastest growing medium ever, and video sharing platforms allow for content management and sharing, and interactions with others centered around videos. On YouTube, the official video sharing platform of USAID, 50,400 hours of video are uploaded every day. The Agency's channel is: http://www.youtube.com/usaidvideo.

Social Network: In the same way that blogs started out with a very "personal" quality and have since been adopted by businesses, non-profits, and government agencies, social networks started off as a way to connect individuals through their personal profiles, and now also connect formal entities with target audiences so they can share information. Facebook is one of the official social networks of USAID (the second is LinkedIn) and can be accessed at http://www.facebook.com/USAID.News.

According to the research firm comScore, almost one out of every eight minutes spent online is spent on the social networking site Facebook. This makes Facebook and its competitors like MySpace, LinkedIn, Orkut, Zing, Bebo, Hi5, Odnoklassniki, and V Kontakte, to name a few, a logical place to try to reach online audiences. Facebook has more than 500 million active users and 70% of them are outside the United States, which makes it ideal for USAID audiences.

SOCIAL MEDIA SHOULD ADVANCE YOUR COMMUNICATIONS STRATEGY

It is easy to get involved with social media for social media's sake. But if you decide to utilize social media, there should be a clear tie to your mission's communications strategy. Establish up front what your objective is (i.e. who you are trying to engage, what messages you want to get across, which platform or platforms are most appropriate).

Coordinate with the Public Affairs Section at the Embassy as they likely are already using social media. They may have done a social media analysis, which can help inform your USAID strategy. Also, local (and even international) PR firms may have done research and analysis on the social media landscape in your country also, so see if anything is readily available.

You can also do your own research. There are countless social media monitoring tools available on the web. Most range in price from free to several hundred dollars a month. One free tool for Twitter that makes it easy to find tweets with a keyword and location is www.monitter.com. With regard to Facebook specifically, www.socialbakers.com has specific metrics on over 200 countries, updated daily. This information will be helpful to gauge the size of target audiences on individual platforms, so you can decide which account/s to set-up.

Regarding social media, "What we have to do is ourselves become more aggressive…more intelligent…more engaged in these network spaces."

– Alec Ross, Senior Advisor on Innovation, Department of State

WHAT COMMITMENT IS REQUIRED ONCE I DIVE IN?

You probably are asking yourself, "how much time and effort will it take to engage in social media tactics?" It's a fair question, but there is no single answer. It depends on the platform/s, how close you want to get to best-practices, if you have bandwidth limitations, and most importantly, how large and how vocal a group of participants you connect with. If you plan to use multiple platforms, a resource such as www.hootsuite.com can allow you to post to multiple platforms simultaneously, saving time and effort.

The truth is, the more successful you are at social media communications activities, the more time it will take. The payoff, however, is real engagement and an ability to capture quantitative measurements to demonstrate communications impact.

ESTABLISHING ACCOUNTS

LPA provides one-stop support to make starting Mission social media accounts as easy and quick as possible, and to ensure that USAID legal disclosure requirements are met: simply contact socialmedia@usaid.gov and the social media team will get you up and running, as well as write your account profile.

If you have one or more social media accounts established already, check with the social media team to, among other things, make sure account names are in compliance with USAID social media rules and to provide LPA a list of all administrators and passwords.

LEVERAGING YOUR WRITING SKILLS—BLOG CONTENT

As communicators, we all write and have mastered many forms of written communications. Adding blogging to that list should not be hard. But it takes practice.

Here are some qualities to shoot for in your posts that should maximize the size and engagement of your target audiences:

Timeliness
A post, because of the reverse-chronological nature of blogs, only resides at the top of the page until a newer post comes along, which pushes the earlier post down and eventually off the page altogether. Hence, it is best to blog about major developments in programs/projects that qualify as news, or programs/projects related

Missions' social media accounts are shown with icons at http://www.facebook.com/USAID.

to topics showing up in the news media, even if there are no breaking developments in those programs/projects, per se.

Short Length

There is no definitive rule on how long blog posts should be (it depends on the subject matter and complexity of the idea being addressed), but 250-600 words can be used as a basic guide.

Informal Tone of Voice

From a stylistic perspective, a blog is expected to have an informal quality. Even on a government blog, the surest way to lose a blog reader is to present them with an "official voice." Write the same way you would talk in a typical conversation and as previously mentioned, feel free to write in first person.

"Linkiness"

Social media is all about networked communication. Best-practices blogging catalyzes this multi-party aspect and helps drive the conversation rather than simply stating a point and being done with it. Here are several recommended approaches:

● Link to content on USAID.gov, your Mission website, or an affiliated site. This allows you to include related background material or additional details by reference.

● Link, with copy that explains the context, to a counterpoint. You may get a response posted in the social media environment from the author. You can then respond in turn. The more of this back-and-forth that goes on, the more content you are putting out there in the blogosphere, the more people who will join in the discussion, and the further you raise visibility and understanding.

● Link to a related news article from a well-respected publication. This enhances your credibility and authority on the issue, and if the journalist is keeping an eye out for backlinks, s/he may join the discussion on your blog.

Inclusion of an Image

Try to include a picture or video with your post. Eye-tracking studies have found that an image that provides information highly-relevant to the text leads to more people reading the post.

Optimization

Use key words in your title, in the body copy, and as tags. This will draw search engine traffic to your post.

GETTING STARTED WITH BLOGGING

When when it comes to blogging, it helps if you are a prolific writer by nature—for blogging calls for regular installments of content and tends to fail as a communications channel if it does not maintain a serial aspect. One of the best ways

to build momentum as a blogger is to do it part-time. Contribute content on an ad-hoc basis to the Agency's blog, IMPACTblog. The Deputy Director of Interactive Communications is the D.C.-based publisher and regularly sources material from the DOC network. Of particular interest are human interest stories, stories that focus on impact, stories that align with "centers of gravity" on the IMPACTblog calendar, and reformatted versions of Telling Our Story articles.

Should you decide to start a dedicated Mission blog, contact the Deputy Director for Interactive Communications and the social media team at socialmedia@usaid.gov.

SOCIAL MEDIA IN A COMPACT PACKAGE—TWITTER

Brevity is the name of the game for microblogging. Twitter limits posts, called "tweets," to 140 characters, including spaces and punctuation. Twitter provides a character counter to the lower-right of the submission box, which is an essential tool for getting the count under the limit. It often takes several rounds of edits, tightening up your copy each time, before you can post in the "What's happening?" entry box.

You "Follow" selected people to see what they are tweeting and other people can elect to follow you. The tweets of each of the people you follow are aggregated into a "feed" on your Twitter homepage under your "Timeline." You see their profile picture, account name, and tweet.

Here are a few best-practices to follow:

● In your tweets, reference other Twitter users, particularly partners and influencers, by using the "@" symbol before their account name. When they log-in, right next to their Timeline tab under "@ Mentions" (pronounced "at-mentions"), they will see a list of tweets where other users (in this case, you) have mentioned them. Think of at-mentions as equivalent to walking up and introducing yourself to a stranger to start a conversation.

● Let's look at an example. USAID tweeted the message below at-mentioning Cameron Sinclair's Twitter account name preceded by the "@" symbol in the body copy:

USAID-centric hashtags include #usaid, #aid, #development, #poverty, and #MDGs. Other hashtags that might be appropriate, based on your content, include #women, #Afghanistan, #GlobalHealth, etc.

And Sinclair tweeted back, at-replying @USAID:

> **casinclair** Cameron Sinclair
> @USAID no need to ask! :)
> 13 May

And so a conversation was started!

● Occasionally, an at-mention will result in your tweet getting "retweeted" by the person you reference. Here's an example where USAID at-mentioned the Peace Corps, @Peacecorps. USAID tweeted "Thanks to the 300 @Peacecorps volunteers…" and when Peace Corps looked at their "@ Mentions" tab they decided to use the Retweet function (designated by a two-bent-arrow icon accessible under the original tweet, in their timeline), to send it out under their account, which resulted in it reaching an additional 386,994 people as shown below!

> **USAID** USAID ↻ by PeaceCorps
> Thanks to the 300 @Peacecorps volunteers working to #endmalaria in Africa
> 26 Apr

> About @PeaceCorps
>
> | 1,390 | 1,383 | 386,994 | 3,076 |
> |---|---|---|---|
> | Tweets | Following | Followers | Listed |

● Use hashtags. There are over 110 million tweets posted each day, but most is just noise. Cutting through the clutter is certainly a challenge. Luckily, you can make some headway with hashtags ("#" symbol immediately preceding a keyword in tweets that makes it clear what the main subject of the tweet is). Using the search function with just the keyword (without the preceding "#"), provides results that are too broad. For example, if you were to search for "development," you'll get tweets like this one below.

> **HipsterMermaid** Hipster Mermaid
> If you don't understand every obscure Arrested **Development** reference I make, then I guess we just can't be friends.
> 17 May
> Top Tweet
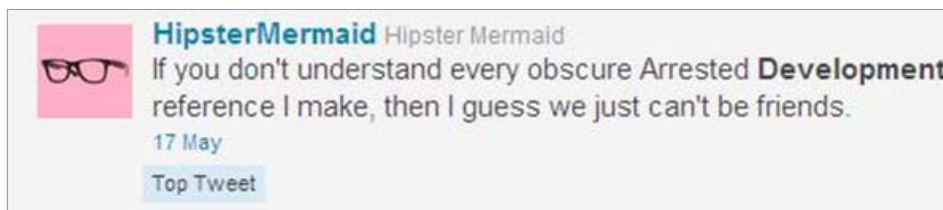
This tweet is not about international development, and it does not give us any reason to assume that the account regularly covers foreign assistance. Hashtagging lets you more accurately find tweets on the topic you want so you can strategically identify relevant accounts to follow. It also provides a way to aggregate all relevant tweets into a single feed to keep current on the conversation taking place on that topic.

It is generally best to stick with established hashtags (www.hashtags.org is a good

place to research) rather than create new ones. The point is to tap into conversations already taking place around the topic. The one exception is if you are planning an event where there will be many participants tweeting from it or many people in the "Twitterverse" that you expect to follow the event and subsequently tweet relevant comments (#TEDxAms is a great example…six months before the event is scheduled to take place, there is already a significant conversation going on…there are many tweets each day using the hashtag to talk about the still distant event).

Hashtags often go at the end of a tweet, like this:

> **USAIDKenya** USAID Kenya
> Farmer Doubles Maize Produce http://bit.ly/hwJcW5 #usaid #kenya #agriculture
> 13 Apr

You can also turn a keyword in the body copy into a hashtag, as in the below example:

> **USAID** USAID
> #ACFVA members ask about the impact of youth from the #arabspring and what it means for programs
> 13 May
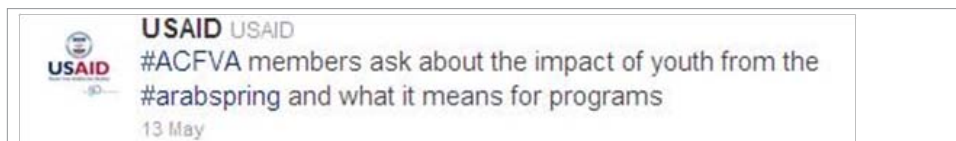
● Provide a link to more detailed content, using a link shortening tool to turn a long URL into a shorter one, saving characters. Two free sites that quickly and easily provide this service are http://bit.ly and http://tinyurl.com. There is a free government-run site at http://go.usa.gov as well, but note that it requires you to log-in with a user name and password, and only shortens government links (those that end with .gov, .mil, .si.edu, or .fed.us). An example is below:

> **usaidparaguay** USAID/Paraguay
> Strategic Dialogue with Civil Society: Western Hemisphere, May 25, http://bit.ly/j0AJFE (Spanish), http://bit.ly/kK9WJH (Eng) Participate!
> 18 May

● Traffic on Twitter is highest on Wednesday and Thursday, so if your content is not time-sensitive, plan on those days for posting.

● Use "Who To Follow" on the top navigation bar and click "Browse Interests." Look under "Charity" and "Government" for some initial ideas of who to follow.

● Use the search function and Twitter's find-account-using-email-address function to identify other people to follow. Specifically try to identify:

• Partners

• Local NGOs

• Reporters

Occasionally ask your followers to "Please retweet" or "Please RT" as research shows that these are two of the top five words that generate retweets.

• Local and international aid experts with interest in your country

• Influencers

• Citizen journalists

Your follow list is public and reflects upon the Agency, so only follow accounts that are related to development (i.e., do not follow gag-accounts, political campaigns, or celebrities).

● Check your at-mentions tab and "Messages" tab (for email-like direct messages from followers) regularly and respond quickly.

IT'S ABOUT WHO YOU KNOW—FACEBOOK

Building a Facebook community is like building a community of friends offline, by sharing the things you find interesting. Equally important, you listen to what they like, find interesting, and have to say. Of all the social media platforms discussed in this chapter, Facebook is the one that places the most emphasis on regular feedback, although the feedback need not be elaborate. A simple thumbs-up "like" shows interest and qualifies as engagement.

The social media team in D.C. will provide you with a basic account set-up, but how you customize and use Facebook for in-country strategic purposes is largely up to you. The best way to learn how to use this social networking tool is to jump in and explore, and use Facebook's Help section when you get stuck. Most of the action takes place on your homepage, where you'll see your status updates, and the updates of those you are connected to on your "Wall."

Some of the ways you can use Facebook include:

● inviting followers of your page ("fans" on Facebook) to Mission or Embassy events

● sharing a summary (with a link) of information that has been posted to your Mission website or www.usaid.gov

● pointing to a news article on USAID's work

● showcasing photos or video from USAID projects

● engaging your target audiences in discussion about USAID's work by posting an open-ended question

Here are some more suggestions to get you started:

● Allow users to post text, photos, and video on your Wall. This is the basis of

engagement.

● Add the Event application to showcase Mission or Embassy events of interest to your target audiences. The default location for Events is on your wall, but you can create a custom tab for Events. This is a good idea for organizational purposes if you have many events posted.

● Use Notifications to get an email notification whenever someone interacts with your Facebook account. This allows you to monitor your account without having to log-in all the time.

● This is a best-practice with all your social media accounts, but it's particularly useful on Facebook...cross-reference your other social media platforms so Facebook users can easily jump to your blog, Twitter, YouTube, and Flickr accounts.

● Spread your content out over time, if you happen to have a sudden surge. You don't want to overwhelm your fan base, and you do want to build a consistency of engagement.

● Make photo albums to organize photos. Have an album that's for the "shot of the week" and select "This is the album cover" so it appears on your Wall.

● Note: your account should include a "Terms of Use," and a Comments and Privacy Policy as part of the standard set-up; if these are missing, please contact socialmedia@usaid.gov.

MEASUREMENT AND EVALUATION TOOL FOR FACEBOOK

Facebook provides metrics and analytics in the "Insights" section, which you can access from Edit Page>>Insights. You can get information such as:

● Countries and cities your fans are from

● Male/female ratio

● Age groups

● How many people are joining/leaving your site

REACHING FANS OF OTHER USAID FACEBOOK WALLS

USAID/Washington's Facebook page, as well as any Facebook pages maintained by regional and/or pillar bureaus, are excellent places to expand the visibility of your Facebook content…if it has regional or global significance. Contact the Deputy Director of Interactive Communications who handles social media, and lead communicators for the geographic and thematic bureaus to see if your content would be appropriate for cross-posting.

SHARING FIELD-PRODUCED VIDEO EASILY—YOUTUBE

Sharing video content you have produced through the web is one of the easiest and quickest ways to get that content in front of target audiences. Specifically, hosting video on www.YouTube.com allows you and others to link to the video on webpages, and have it show up quickly in search engine results (like those provided by Google and Bing). The growth of YouTube continues to break records. In its sixth year, users upload 48 hours of video every minute…twice as much per minute as a year ago. Global views are up 50% over last year to 3 billion a day. Advantages of using YouTube rather than hosting it directly on your website's .gov server include the fact that it is free, and does not require the involvement of your webmaster.

YouTube accepts a wide range of file types, and you should not have a problem uploading MPEG4 (Flip generates these), WMV (Windows Movie Maker generates these), and MOV (known as Quicktime, which iMovie or Final Cut Pro can create) files.

As discussed in the video chapter, you generally want your videos to be two-to-three minutes (and almost always under five minutes), so YouTube's 15 minute limitation and file size limit of 20GB should not be a problem.

DEALING WITH LOW BANDWIDTH

In many countries, internet bandwidth is a major consideration that can be a deal-killer when it comes to large video files. Fortunately, there are ways to "compress" video files that allow them to more easily move across the internet. Be sure to select "I have a slow connection. Never play higher-quality video" to mitigate problems.

OPTIMIZE AND ORGANIZE

● To ensure that search engines (i.e., YouTube, Google, and Bing) correctly index the video:

• Create a short title using key words that clearly states what the video is about. Write a 2-3 sentence description that includes the keywords used in the title, and optionally include one or two other keywords.

• Select a Category ("News and Politics" seems the most appropriate).

• Include as many appropriate tags as possible (including the keywords used in the title and description).

• Include Channel Title and Channel Tags

● Video navigator allows viewers to watch a video on the channel rather than having to jump to the video's page

● As you add more and more videos, group them into topics and create a playlist for each topic

CAPTION

Use YouTube's "Add A Caption" function (under the "Captions and Subtitles" tab) to generate synchronized captions. You can do this easily for English by simply upload a text file transcript. The accuracy of the automated English captioning placement is quite amazing, provided the speaker/s do not have an accent and there is not too much background noise. If one of these situations exists, or you want to caption in one of dozens of other languages, you can provide a caption file with time codes. This makes sure the text captions appear at the correct time. For details, see http://portal.usaidallnet.gov/documents/2943.

WAYS TO TAKE ADVANTAGE OF YOUTUBE'S SOCIAL ASPECT

● Use the comments feature for both your Channel and videos; it is suggested that you moderate these comments per the USAID moderation policy

● Cross-reference your other social media accounts in your profile

● Do searches on YouTube development for topics related to your country and the various topics, programs and projects, and subscribe to those targeted channels; this helps get your channel visibility and should increase your subscribers over time

● When people subscribe, thank them …this gets you exposure on their walls and hopefully some viral subscribers

LEVERAGING USAID/WASHINGTON'S CHANNELS

In addition to your Mission's YouTube channel, your video content might find a broader audience if it is also hosted on one or more other Channels. These include the main Agency YouTube Channel, but regional and pillar bureaus are possibilities too. Be sure to email the Deputy Director of Interactive Communications who handles video, as well as the lead geographic and thematic bureau communicators.

MEASUREMENT AND EVALUATION TOOL FOR YOUTUBE

YouTube provides an analytics package called Insight. You can find out how many people watched the video, and the demographics of your viewers. It also shows you how they were directed to your video (Insight Discovery), which can give you a valuable understanding of what you've done well that is driving traffic, as well as identify areas that need attention. Other metrics that are indicators of true social media engagement can be pulled from the Community report—which shows how many viewers have rated, commented, or favorited the video—and from the Subscribers report—which quantifies how many people have proactively opted to

stay involved.

LEGAL CONSIDERATIONS

● If you embed a video (rather than link to it) on a Mission website, the video must be captioned

● YouTube videos set a cookie on user's computers, and this needs to be disclosed in the web privacy policy, per http://www.usaid.gov/privacy.html

A DOC PICTURE TELLS 1,000 WORDS—FLICKR

Photo sharing of development-centric photos on Flickr can serve several purposes:

● Raises awareness of current mission activities, impacts, etc.

● Engages target audiences through a discussion that is kick-started by a photo

● Provides download access to USAID photographs that others may use in their online communications, effectively expanding a photo's audience size

Here are some best-practices for Flickr:

● Write a keyword-rich and descriptive title, which will appear in bold above the photo; try to include names, subject, location, and the date (or description of date such as International X-Day), if relevant; if you include the name of a beneficiary, be sure to get a release

● Write a description of a sentence or two, using the same keywords as in the title and others

● Include a list of tags, which are the keywords from the title, description and any others that did not fit conveniently in those areas

● Provide appropriate credit info

● List as "Government Works" image so others can utilize it and create a viral communication pointing back to your Flickr page; if this is not shown as an option, contact socialmedia@usaid.gov

● Allow participants to leave you a message or provide feedback by posting comments; this is the whole idea behind "social" media, after all; be sure to post and follow USAID's comment policy

● Create groups of photos that go together into what Flickr calls Sets

● Put Sets into larger groups called Collections

● Metrics (Flickr calls them "stats") that show how many times your images have been viewed, and where the viewers came from, is available with the Pro account

DOES SOCIAL MEDIA REALLY WORK?

Some aspects of social media are really easy to evaluate because of its digital nature. Most importantly, you can readily tell how many people have actually seen your content. Contrast this with non-digital advertising where calculating "impressions" is still a fuzzy metric based on generalizations and assumptions. In addition to how many fans/friends/followers you have, social media platforms give you other metrics such as likes, shares, and retweets, which demonstrate that the information you are posting is being received positively. Similarly, you can dig into your Mission's website analytics to see how social media platforms are driving traffic to the website, another engagement metric.

SOCIAL MEDIA DRIVES TRADITIONAL MEDIA

It may be difficult to analyze and demonstrate the correlation, but utilizing social media to reach target audiences in the social media environment increases the likelihood of connecting with audiences that consume traditional media. According to the media monitoring firm Cision, the majority of journalists and editors depend on social media sources to research news stories. Per their survey, 89% use blogs while researching stories, 65% use sites such as Facebook and LinkedIn, and 52% check microblogging platforms like Twitter.

FIRST-TIMER WITH SOCIAL MEDIA—JUMP IN

If you are looking for an unmistakable "green light" to start using social media, please read what was sent following a senior staff meeting by Secretary, Assistant Secretary Feltman:

Subject: Message for COMs from A/S Feltman: S Request for Increased Social Media Engagement

Request for Increased Social Media Engagement

During her most recent senior staff meeting, the Secretary requested that all bureaus make social media engagement a top priority. This social media push comes on the heels of the Secretary's speech last week, "Internet Rights and Wrongs: Choices & Challenges in a Networked World", and her social media dialogue this week with

Egyptian youth via Masrawy.com. The Secretary would like additional officers with language proficiency, especially young officers, to engage directly with local audiences via Twitter, Facebook, blogs, and other media, in order to be at "the heart of the conversations" on U.S. foreign policy and on issues that local audiences care about most.

I encourage all NEA posts to respond to the Secretary's request to boost their social media engagement efforts by utilizing resources and talents of young officers as well as officers proficient in Arabic, Farsi, French, and Hebrew. Some of your posts have already been actively engaging with local publics via social media, and we thank those who have sent NEA/PPD information about this new media outreach per NEA/PPD's request last week.

I understand that officers who undertake this effort under the aegis of their Front Offices will have to exercise judgment and discretion in how to engage on these platforms as USG-affiliated voices, as well as how to manage their time, but telling America's story today requires that we smartly pursue new media outreach opportunities beyond traditional platforms. We ask that you discuss engagement ideas at posts, and let NEA/PPD know of any concerns or needs you may have.

I also urge you to intensify your posts' efforts to cultivate relationships with online influencers, as well as individuals and organizations representing youth in your countries.

Here are some items to consider as you update current or create new plans regarding your social media engagement efforts at posts:

• What is your local social media environment? Who is doing what, and over what platforms? It is essential to identify social media influencers and cultivate relationships with them. This can be done by a) re-tweeting content by local social media influencers as a way of entering their conversations, b) encouraging them to re-tweet your messages and @USAbilAraby, for example, and c) feeding them content which they can distribute in their own voice.

• Do you take pictures and video of your PD programs? Do you push this content out via social media?

• Do you post questions to start a discussion? Do you post twitpics of events/ scenes that are being described in local chatter?

• The Social Media Hub provides a number of resources, including guides and best practices, that we encourage you to explore and review.   IIP's Web Engagement Group also prepares a "daily social feed" with content for use on your social media platforms. I have included a sample feed below for your reference. IIP is currently developing Arabic and French versions of this content which will be available daily

starting next week. If you would like to receive daily content for Twitter/Facebook in English, please contact evansle@state.gov. If you would like to receive daily content for Twitter/Facebook in Arabic, please contact gharibr@state.gov.

• IIP's Web Engagement Group is also working to arrange training sessions in English or Arabic to posts that require assistance (through webinars, phone, and in person). Please let us know if you would be interested in this type of assistance, and if there are other needs/questions you may have.

Social media is a topic that is new to many, so start with a manageable strategy that uses only one platform and build from there. Remember, social media is at its core about providing regular, interesting content to engage target audiences. This should not be hard to do…we work in development which generates an unlimited amount of human interest stories. Share them!

SOCIAL MEDIA AT THE STATE DEPARTMENT

As we move forward, USAID will more closely align social media communications strategies with the Department of State. Below are several items State distributed recently supporting their policy to utilize social media at all Embassies and Missions:

● State-issued Aldac regarding social media guidelines: http://telegrams.state.gov/aldac/view_telegram.cfm?teleid=9429916

● Official State Guidance on using Social Media: http://arpsdir.a.state.gov/fam/05fam/05fam0790.html

RESOURCES

● **Social media team email:** socialmedia@usaid.gov

● **State Department IIP Resources**

• www.socialmedia.state.gov

• http://wordpress.state.gov/socialmedia/guides/facebook/

• http://wordpress.state.gov/socialmedia/guides/twitter/

● **Other resources**

• http://support.twitter.com/

- http://www.facebook.com/government

- http://www.facebook.com/help/

- http://www.howto.gov/social-media

- Social Media Guide by Columbia Journalism School professor and Dean of Student Affairs, Sree Sreenivasan: http://sreetips.tumblr.com/post/342517218/socmedia

- Common Craft videos: Short and simple video explanations of blogs, social media, social networking, Twitter, and more…at http://www.commoncraft.com/videos

- Mashable: One of many websites with a treasure trove of information on social media. Use their search function to find helpful tutorials on social media at http://mashable.com/?s=social+media+tutorial

- Mashable's Twitter Guide Book: http://mashable.com/guidebook/twitter/

- YouTube Help Menu: http://www.google.com/support/youtube/

- YouTube Handbook: http://www.youtube.com/t/yt_handbook_produce

- Case Foundation Social Media Tutorials: While nonprofit-centric, there are dozens of video tutorials, covering social media strategy and platforms, at http://www.casefoundation.org/social-media-tutorials

Chapter **17**

Writing a USAID Mission Communications Plan

Author: Gregg Rapaport

ADOPTING PLANNING AND MANAGEMENT BEST PRACTICES

Taking the Development Outreach and Communications function to a higher level can be achieved by aligning it with your Mission's Country Development Cooperation Strategy (CDCS) and transforming it into a discipline easily recognized within the Mission as one that follows relevant Agency best practices for planning and management, which are specified in the latest Program Design Guidance.

Many Missions are now finalizing a five-year CDCS. Ideally you will have been involved in the CDCS development process, but even if that has not been the case, you will want to ensure that DOC-led communications and outreach reflect the specific and latest priorities specified in the final CDCS document.

Country-specific programming issues aside, the Agency's CDCS Guidance specifies several general directives that should influence your thinking as you create a Mission Communications Plan.

The first is collaboration. Just as the Mission develops and executes a CDCS with host country governments and citizens, civil society organizations, the private sector, multi-lateral organizations, other donors, the U.S. State Department and other U.S. government agencies, so too should the Mission develop and execute a strategic communications plan with the largest group of internal and external stakeholders possible. While the program and front offices, and the Department of State's Public Affairs Section (PAS) are essential to getting internal buy-in and making your plan as strong as it can be, don't stop at the Mission/Embassy gate.

Second, reflecting the fact that each CDCS is to incorporate the "USAID Policy Framework for 2011-2015," the Presidential Initiatives and USAID FORWARD, Mission communications and outreach should also be based on these foundations.

And third, just as a CDCS "focuses on achieving development results that have clear

and measurable impacts," so, too, should a Mission Communications Plan specify an objective, detail how that objective will be achieved and explain how progress toward achieving the objective will be measured.

This chapter will go into detail on how to succeed in doing exactly these things, by leveraging best practices from the Agency program design and management methodology.

EVOLVING FROM COMMUNICATIONS TO STRATEGIC COMMUNICATIONS

Let's start with a clear perspective on the Mission communications function.

Tactics are what communications officers spend the majority of their time and resources on, and that's to be expected. After all, communications and outreach are dynamic activities. But given the never-ending stream of requests for support, it is easy to become reactive 100% of the time. In reactive mode it is difficult, if not impossible, to judge the opportunity cost of ad hoc activities, if those activities generate any impact, and if they serve any strategic purpose even if they do generate some impact.

The Mission communications function should *generate predefined benefits to the Mission and Agency; and it should go about generating these specific benefits in a deliberate, orchestrated and measurable manner.* The brutal truth is you can only be a reliably strategic communicator by minimizing reactivity and instituting a proactive results-oriented approach.

AN EXAMPLE

Consider the fundamental difference between doing things, doing things that have impact, and doing things that have impact and also reliably generate positive benefit.

Let's use an example of a press release. You might write it and save it to the Mission website, but if few people visit that page, you will have accomplished little.

A different approach might be posting an attention-getting "hook" on a well-followed Mission Facebook Page, linking back to the press release. A blogger who "likes" your Page might notice the USAID post—because it shows up in his or her Facebook News Feed—and decide to write a blog post on the subject. If the blogger is widely read, you will have (unwittingly) generated more impact. But what if the blogger is a critic, rather than a supporter of U.S. foreign assistance? The higher-level impact may actually be to USAID's detriment. This illustrates the importance of having a defined result that you are striving for and a plan to achieve that result, before you engage in nuts-and-bolts communications tactics. Otherwise, you simply don't know if the impacts you generate will be ones you actually want.

Now let's consider a variation on the example that demonstrates doing things that have impact and also reliably generate positive benefit. Assume that the subject matter of the press release has to do with a long-term priority of the Agency (for example, global health, food security or global climate change) or a specific program that has anticipated milestones. If you had previously identified and built relationships with journalists, bloggers and other influencers covering or involved in these key issues, had selected those that reach your target audiences, and anticipated the programmatic milestone, then when that milestone arrives you could proactively feed the relevant "intervening publics" a pre-written press release. You could go one step further and provide already-prepared photographs and video, and also arrange interviews with Mission and project spokespeople.

This approach would provide far more control over the message and dramatically increase the chances that positive stories about USAID and American foreign assistance will get to your target audiences. Moreover, it would be disciplined, scheduled and ultimately measureable.

So, thinking carefully about what you want to achieve is paramount before you think about what to do. Take a moment and let that sink in. In the above scenario, it's not really about a press release, is it? The activities required go far beyond just writing a few paragraphs. You need to coordinate with program staff, research target audiences, build relationships, create multi-media content, draft talking points, prep USAID spokespeople and schedule interviews. *Only by defining the results you want at the outset can you design a logical process to generate them.*

It requires stepping off the "runaway train" of day-to-day work to set this up. It takes an investment of time. And it is not easy. However, the payoff is that you will generate desirable and expected outcomes, and that's a great return on investment.

PROGRAMMING OVERVIEW

The approach to creating a Mission Communications Plan suggested in this chapter is a best practice because it integrates or parallels much of the same planning and management methodology employed by program officers throughout USAID.

An overview of the Agency programming process can be visualized along a timeline:

PLAN AND ORGANIZE THE PROCESS → CONDUCT ANALYSIS ↔ IDENTIFY KEY PROBLEMS → FORMULATE THE STRATEGY → IMPLEMENT THE PLAN → ASSESS AND LEARN → USE PERFORMANCE INFORMATION
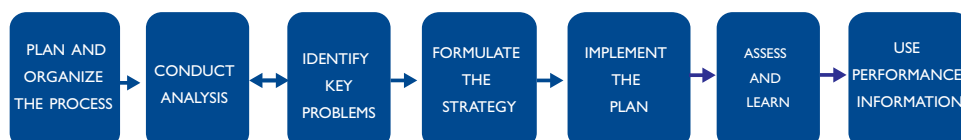
Development Outreach and Communications can and should be thought of programmatically just as other development activities are. If we customize the above graphic for our use, the chronology might look like this:

| MISSION BUY-IN | RESEARCH; SWOT | STATEMENT OF CORE PROBLEM | RESULTS FRAMEWORK; STRATCOMM PLAN | TACTICAL RESULTS | PMP | REPORTING AND STRATCOMM PLAN REVISION |
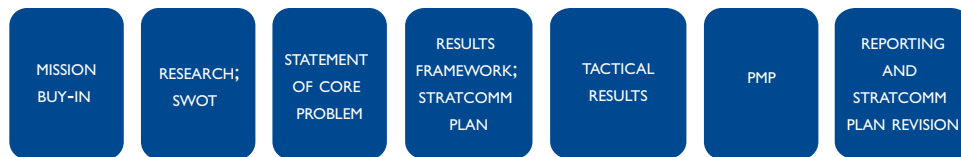
What you should see embedded in this visual representation is:

● a clear understanding of the *starting point* ("where you are")

● a vision of an *improved future* ("where you want to go")

● a *progression of steps* that logically lead to the expected change/s that bring about the envisioned future ("how you will get there")

● a clear way to *judge performance of the plan* ("how you can tell if you're actually getting to where you want to go")

● a way to *redirect* if performance is not up to expectations

Overall, you want to follow a process of "*managing for results*," which is at the heart of USAID Program Design Guidance. To be fair, however, it is not possible for a DOC Officer to exactly mirror how a program officer sets up a program. There are aspects of Mission communications that make it different from programmatic work. Moreover, program officers take a two-week Project Design and Management Training course (and the prerequisite Programming Foreign Assistance course) before getting started. Unfortunately, few DOC Officers have the luxury of taking such courses, which truly have a programmatic focus.

But while we may have more modest goals, we will end up "speaking the same language" and using the most relevant core tools that program officers use. That will create a certain level of parity with other Mission staff and improve the effectiveness of the Mission communications function.

RESULTS FRAMEWORK

The Mission Communications Plan itself will get written out as a narrative, but much of the strategic thinking you will be doing takes place in the development of a Results Framework. This Framework is a *graphic representation that lays out cause-and-effect linkages to achieve a desired outcome*, based upon available resources and a

specific timeframe. It also takes certain assumptions into consideration.

It is fundamentally a collection of tiered boxes and connecting arrows, where cause-and-effect logic dictates that each level identifies the results that are "necessary and sufficient" to achieve the level above.

You will be using a customized Results Framework for communications purposes, but below is the Results Framework template for the CDCS development process. It is shown to illustrate all the components of a Results Framework as USAID uses them.
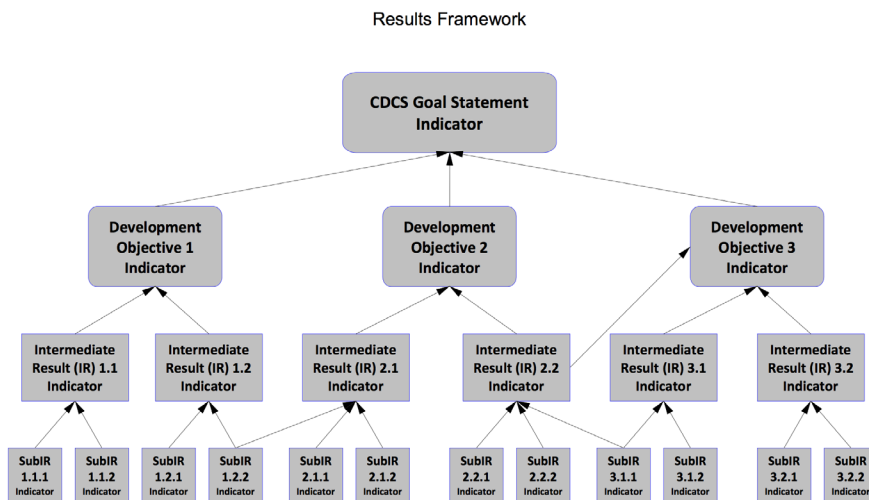
Results Framework

We will be modifying this to generate a communications Result Framework with:

● elimination of the CDCS Goal Statement;

● one *Mission Communications Objective* (rather than several Development Objectives);

● Intermediate Results (*IRs*) on the next level;

● *Sub-Intermediate Results* (*Sub-IRs*) on the bottom level; and

● at least one *Indicator* for each component, which measures your success toward achieving the relevant Sub-IR, IR or Mission Communications Objective. Note that these Indicators will be the foundation for your Performance Management Plan, or PMP, but we will be considering them during the Results Framework development as a prerequisite to the creation of the PMP.

Details on the Mission Communications Objective, IRs, Sub-IRs and Indicators will follow later in the chapter, but it is helpful to have them in mind from the outset.

BACKGROUND, RESEARCH AND SITUATION ANALYSIS

The communications planning process starts by getting a sense of the here and now. If there's an outdated communications plan (and you may be the person who wrote it), it is suggested that you do not use it as a starting point. You can certainly pull certain information from the existing plan (if the information is still current), including literacy rates, publication rates and media information, for instance. But beginning with an unbiased and unconstrained outlook, and working through the steps of building a plan in the suggested order, is the best way to bring your full analytical ability and creativity to the task.

It does not matter if you have been at the same Mission for years or have just arrived for your first day as a communications officer: mentally shift into the role of "researcher" and uncover what others have determined about the communications context on the ground and public opinion toward the U.S. and American aid. Logical starting points are the Public Affairs Officer at the U.S. Embassy and USAID program officers. Obviously, the Mission Director and senior staff will also be critical to this undertaking. Get as much background from them as you can.

Now that you have some background, look for secondary research, which is data that someone else collected for a particular use that you can repurpose. Possible sources for secondary research include:

- State Department's Bureau of Intelligence and Research (INR)

- Pew Research Center's Global Attitudes Project

- Internews

- National Democratic Institute (NDI)

- International Republican Institute (IRI)

Implementing partners, academics, NGOs, governmental or corporate sources are other options for finding secondary research. In fact, your implementing partners are a critical link to information and context for the Mission Communications Plan, and should be heavily factored into this research stage. Another critical source of information is likely to be host country counterparts, such as ministerial or local government officials (obviously, you know better than most the need to work with these contacts via relevant Contracting Officer's Representatives, or CORs, and others).

Next, consider doing some primary research. You might be able to add questions to public opinion surveys being conducted by the State Department's research arm and/

or your PAO's annual in-country surveys, the Pew Research Center, implementing partners or others. Or you may need to commission your quantitative or qualitative research directly. The value of primary research (as compared to secondary research) is that you get to pose questions that are directly related to USAID and foreign aid in general. Many relevant questions for this purpose have already been designed, so please reference Chapter 13 which contains standard survey questions. By using these questions, which is highly recommended, USAID can make country-to-country comparisons and analyze trends over time.

A great deal can be learned from doing a simple media analysis. What articles and op-eds have been written in local media in the last year about USAID, U.S. foreign assistance or the U.S. generally? Have they been fair? Accurate? Where were they placed? Were they in prominent publications?

You may also want to do some informal research by getting out of the Mission and talking to people. Slip out of your researcher role and into a "detective" role. Ask people who are part of your target audiences how they get information. Are there channels of communication that they trust more than others? If so, why? Obviously, only do this if the local context allows for it and there are no security concerns or other constraints.

Meet with implementing partner communicators and discuss what they have found to be communications stumbling blocks and what's worked well. Talk to local reporters and get a sense of how far in advance they need story ideas, media advisories and press releases, and what the best way to reach them is.

Next, pull all of your background, secondary research, primary research and informal research together into a S.W.O.T. analysis, which stands for Strengths, Weaknesses, Opportunities and Threats. You can visualize the way these four qualities are organized as such:

The formal format for representing a S.W.O.T. is a simple two-by-two grid. Here are just a few possible examples of what might go into a S.W.O.T.:

	FAVORABLE	UNFAVORABLE
INTERNAL FACTORS	STRENGTHS • The Mission Director generally supports comms • The DOC office includes an FSN fluent in several host country languages	WEAKNESSES • The Mission Director does not like public speaking • The DOC budget does not allow for paid media
EXTERNAL FACTORS	OPPORTUNITIES • USAID is mostly unknown, but public opinion about the U.S. in general is high • USAID has success stories that are not yet being covered by the media • There is an independent media and substantial comms infrastructure (TV, radio and newspapers)	THREATS • A substantial percentage of the population is illiterate • Partners do not often and/or correctly brand

Turning your situation analysis into insights like these can make a monumental difference in the development of your plan, and that is why research comes before anything else.

THIS CHAPTER AS A WORKBOOK

In the following pages you will find a series of "how-to" steps that taken together constitute a workbook. When you get to a grey "Action" block, perform the activity requested before moving on. By the time you have reached the end of the chapter, you will have a draft plan which can be submitted for Mission, Regional Bureau and Legislative and Public Affairs Bureau clearance.

If every USAID communicator follows this guidance, outreach and communications across USAID's geographically diverse and organizationally decentralized structure will become more coherent and measurable.

IMPORTANT NOTE: An illustrative Results Framework and other examples are given in the pages that follow. There are two things you should be clear about as you continue to read.

First, while you may choose to incorporate some of this material verbatim, what is provided here is for illustration only to help you develop your skills so you can develop a Results Framework and Mission Communications Plan for your Mission. Please do not consider the Results Framework herein a template and do not consider the many menues of options put forth for consideration as necessarily appropriate for your Mission. What is provided represents one possible, comprehensive way

to think about a communications strategy, but depending on a Mission's staffing, budgeting and the overall importance of the communications program to the Mission, you might end up designing a more modest strategy.

Second, <u>it is not assumed or expected that you can realistically do everything discussed herein or capture all of the Indicator information suggested</u>. In-country contexts differ greatly, so some of the illustrations and options are going to be beyond the scope of what is allowed or can be completed. The breadth and depth of the examples and illustrations provided are to help you best understand the material in a training context so you can make informed and strategic decisions during the course of your own planning and management process.

CORE COMMUNICATIONS PROBLEM

Ask yourself, "What is the core communications challenge my Mission needs to overcome?" Is there very little or no awareness of U.S. foreign assistance? Is there awareness but no specific comprehension about USAID and its activities? Is it negative public opinion regarding the U.S.? These are just some possibilities. You will be better positioned than anyone to identify the local communications challenges and misperceptions.

Action: In one or two sentences, state the core communications challenge USAID faces in your country.

> Here is an example: Insufficient comprehension exists amongst [Country X] citizens that the United States provides foreign assistance to [Country X] through USAID.

The trick is to define the Core Communications Problem in broad but specific terms.

MISSION COMMUNICATIONS OBJECTIVE; INDICATOR

The Mission Communications Objective may simply be a positive restatement of the fundamental communications problem. While that is often the case, the Mission Communications Objective represents t*he most ambitious result that your Mission's DOC office can materially affect, and for which it is willing to be held accountable.* You may have to focus on certain subsets of the citizenry, for example. Also, a lower-level core challenge (such as "insufficient awareness" rather than "insufficient comprehension") may need to be addressed in the Mission Communications Objective, based upon what expectations are reasonable for the DOC office to meet. *Choosing your words precisely is critical.* To see why, consider an example from the private sector: a person could be "aware" of an Apple retail store (s/he knows it

is there) but not have "comprehension" that the store sells electronics (s/he might mistakenly think the store sells fruit). From Apple's perspective, comprehension by potential customers is far better than awareness, but awareness is still better than lack of awareness. So it is with Mission communications.

Action: In one or two sentences, explain the overarching end to be achieved from a communications standpoint, which the DOC office can materially affect and for which it will be held accountable. Put this at the top of the Results Framework.

> For example: Increased comprehension by targeted in-country audiences that the United States provides foreign assistance to [Country X] through USAID.

It might seem like putting "the cart before the horse," but now is the appropriate time to ask "how will I be able to tell down the road, after all the tactics I am going to employ to bring this Mission Communications Objective about, if those tactics actually worked?" The answer has to do with using a Performance Indicator, or measurement. The first time you perform the measurement, it creates a baseline. Subsequent measurements of the same thing will obviously go up, down or stay the same. The relative change in the Indicator is how you will evaluate your progress. Sometimes one Indicator is sufficient and sometimes you will need several.

It is suggested that you review Chapter 14, which goes into great detail on Indicators, so you become discerning in selecting Indicators that are direct, objective, adequate, quantitative where possible/appropriate, disaggregated where appropriate, practical and reliable.

Action: Decide upon an Indicator for the Mission Communications Objective and put it in the same box on the Results Framework.

> For example: # of people in target audiences that can correctly identify USAID as the provider of U.S. foreign assistance to the country

In the Performance Management Plan, or PMP, which you will develop later, you will explain the Indicator's exact definition and unit of measure, data source, method of data collection, frequency/schedule of collection and overall cost, and who is responsible for the data collection (see page 14.17). Either in the PMP or the narrative of the Mission Communications Plan, you will set forth your target for the Indicator. But for purposes of developing the Results Framework, we simply use a concise description of the Indicator.

INTERMEDIATE AND SUB-INTERMEDIATE RESULTS; INDICATORS

The next step in building a Results Framework is to provide a focused vision of

how the Mission Communications Objective will be achieved. On the second tier belong Intermediate Results (IRs), which are essential steps toward achieving the Mission Communications Objective. They are measureable results that may capture a number of discrete and more specific results, called Sub-Intermediate Results (Sub-IRs) which make up the third tier.

It may be helpful to consider the IR and Sub-IR tiers as statements of what must be true after a process of change in order for the next higher tier to be true. Taken together, the Sub-IRs and IRs can be said to realize the top tier, your Mission Communications Objective.

Below is an illustrative Results Framework; a larger horizontally composed version which is easier to read is at the end of the chapter. You may find it helpful to pull the larger one out as a reference.

ILLUSTRATIVE RESULTS FRAMEWORK

Assumption:
- DOC Office has authority to run communications activities (Embassy supports)

Mission Communications Objective
Increased Comprehension by Targeted In-country Audiences that the United States Provides Foreign Assistance to the Country Through USAID
- # of people in target audiences that can correctly identify USAID as the provider of U.S. foreign assistance to the country

Intermediate Result 1
Increased Identification / Acknowledgement of USAID in All External Communications Products
- % of ext. comms products that meet USAID policy requirements on branding/marking
- % of ext. comms products that include a descriptive narrative of USAID (i.e., branding)

Intermediate Result 2
Increased Flow of Information from Mission to Target Audiences
- # of brochures and factsheets distributed
- # of all digital posts
- Extent to which press releases distributed on a regular and systematic basis for key events

Intermediate Result 3
Increased Accessibility of Information for the Target Audiences
- % of target audiences reached by outreach activities
- # (and/or %) of in-country media outlets that cover USAID
- % of target audiences that have received information about USAID (or programs) in the past 12 months

Sub-IR 1.1
Increased Understanding by USAID & Implementing Partner Staff of Comms Rules to Follow
- % of USAID program & front office staff trained that demonstrate increased understanding
- % of Implementing Partner staff trained that demonstrate increased understanding

Sub-IR 2.1
More Effective Systems for Gathering Possible Stories and Identifying Comms Opportunities
- Extent to which an effective system in place to gather possible stories and identify comms opps
- # of story materials submitted to DOC

Sub-IR 2.2
Expanded Collaboration with PAS (and other USG if relevant)
- Extent to which DOC and PAO collaborate
- % of press releases that have "USAID" mention

Sub-IR 2.3
Expanded Use of Digital Tools
- # platforms used (e.g., website, blog, Twitter, Facebook, YouTube, Flickr)
- Avg. # of days/ month digital content posted

Sub-IR 2.4 & 3.1
Expanded Use of Local Language/s in Comms Activities and Products
- # of products that go out in one or more other languages

Sub-IR 2.5 & 3.2
Effective Events Planning in Alignment with the Target Audiences
- # of events held to address target audiences

Sub-IR 2.6 & 3.3
Increased Media Relations Across Range of Local Media Outlets
- # of outlets where DOC has a working contact
- # of journalists that visit a site with DOC
- # of journalist roundtables held

Here are three possible IRs for the Mission Communications Objective:

● IR1: Increased identification/acknowledgement of USAID in all external communications products

● IR2: Increased flow of information from the Mission to target audiences

● IR3: Increased accessibility of information for the target audiences

Let's break down the thinking that led to each of these…

Intermediate Results (IR) 1: Increased Identification/Acknowledgement of USAID in All External Communications Products

The first IR addresses the fact that while there are external communications materials being generated (from the DOC office but also the technical offices and implementing partners), a better job needs to be done of explaining what USAID is, what it does and who funds it. If more materials did this well, increased comprehension amongst target audiences would result.

As previously stated, each component of the Results Framework needs at least one Indicator. For IR 1, here is a possibility:

● Percentage of external communications products that meet USAID policy requirements on branding and marking

The thinking here is that although products are required to be marked appropriately based on USAID policy (which suggests that the baseline for the Indicator would be 100%), the reality on the ground leaves plenty of room (particularly with implementing partners) to increase the percentage of products that are compliant. Details related to the Indicator go in the PMP.

Here is another possible Indicator:

● Percentage of external communications products that include a descriptive narrative of USAID (i.e., branding)

Again, how you exactly define this goes in the PMP, but to provide an example here you might create a precise definition that requires the line "USAID is the U.S. government agency that delivers foreign assistance from the American people."

By now you should see a logical structure to the Results Framework taking shape. If an IR is true, it leads to the Mission Communications Objective being true. And the Indicator (compared to a baseline) tells you if the IR is true.

Taking the logical structure a step further, you are probably wondering how the IR (Increased identification/acknowledgement of USAID in all external communications products) will come about? That's where a Sub-IR comes in.

As previously mentioned, the DOC office is only one producer of external communications products. Other producers (e.g., the program offices and implementing partners) need to also mark correctly and include descriptive narratives. So a Sub-IR that brings about the IR might be:

Sub-Intermediate Result (Sub-IR) 1.1: Increased Understanding by USAID and Implementing Partner Staff of Communications Rules to Follow

The Sub-IR also needs one or more indicators. A possible Indicator for the Sub-IR might be:

● Percentage of USAID program and front office staff trained that demonstrate

increased understanding (of communications rules to follow)

In the PMP, you might go into detail, for example, about a specific test delivered at the conclusion of a branding and marking training where a grade of 75% is the cut-off for the trainee to be considered in possession of understanding of the communications rules to mainstream into their activities. You then count all those that passed.

Let's look at the next IR…

Intermediate Results (IR) 2: Increased Flow of Information from Mission to Target Audiences

The second IR deals with the logical statement that increased information flow from the Mission to Target Audiences contributes to increased comprehension. One way this can take place is if there is more overall information. So some Indicators might be:

● Number of brochures and fact sheets distributed

and

● Number of digital posts

But increased flow can also be a result of more regular dissemination (compared to the sheer number of informational products pushed out). For example, getting any twelve media stories placed in a day is less effective than getting one story about a significant USAID development placed each month. But it's not an arbitrary "one a month" quality that is being suggested. The most impact will come from a flow that leverages each significant communications opportunity. So an Indicator might be:

● Extent to which press releases distributed on a regular and systematic basis for key events

This Indicator is qualitative (rather than quantitative) in nature, which is perfectly valid but a bit more complex, hence we will work through the full development of the Indicator as you would when constructing the PMP.

First, a precise definition is needed. Below is an example.

> Definition: The extent to which press releases distributed on a regular and systematic basis for key events. Key events are the announcement of new programs and projects, program and project launches, programmatic milestones as may exist in program design documents (such as pilot-to-scale phases or infrastructure-to-service phases), program and project successes (as defined by M&E in design documents), Mission Director changes, high-level visits (i.e., by the president, vice president, first lady and second lady)

and five-year anniversaries of Mission.

Second, a unit of measure must be defined. Below is an example.

Unit of measure: qualitative rating

0=No press releases are prepared.

1=Press releases are prepared, but on an ad hoc basis.
Press releases are distributed for some, but not all key events.

2=Press releases are prepared and distributed for all key events.

Third, you list the data source. In this example, it is you, as you will be making the qualitative judgment.

Data source: DOC

Fourth, you explain the process of collecting the data. Below is an example.

Method of data collection: Assignment of rating accompanied by brief narrative to support the rating, to be kept in file for audit.

Fifth, you set the frequency for measurement. Below is an example.

Frequency: Quarterly, with quarterly measurements averaged for an annual Indicator

On the illustrative Results Framework, you can see that there are a total of six Sub-IRs for IR 2 (Sub-IR 2.1-Sub-IR 2.6) that are necessary and sufficient to make IR 2 come about. These can be measured with Indicators too.

Intermediate Result (IR) 3: Increased Accessibility of Information for the Target Audiences

The third IR tackles the issue that just because the Mission is putting information out, it does not necessarily mean target audiences can access it. For example, someone in a remote area almost definitely cannot attend an outreach event in the capital city. Every country is different, and the type of alignment your events should have with your Target Audiences might be based on some other factor (see Sub-IR 3.2) but for the sake of this example, assuming some or all of your target audience is in remote locations, you might potentially look at expanding the geographic diversity of where outreach events are held. This is just one possible scenario, but at the macro level an Indicator for increased accessibility of information regardless of the Sub-IR/s you decide upon might be:

● Percentage of target audiences reached by outreach activities

Another example might be that someone who consumes one form of media (e.g.,

Media Outlet A) may not consume another (e.g., Media Outlet B), so if a story runs only in Media Outlet A, the Target Audience member who only consumes Media Outlet B effectively does not have access to the story. Increased media relations (as defined in Sub-IR 3.3) is one way to bring about IR 3, for example. But at the macro level, regardless of what you decide upon at the Sub-IR level, an Indicator for IR 3 could be:

● Number and/or percentage of in-country media outlets that cover USAID

Another Indicator for IR 3 could have to do with asking (a sample of) the target audiences if they have actually received information, as proof of their having access. In your PMP you might define the Indicator through polling (if you have the resources, of course). Following this train of thought, an Indicator might be:

● Percentage of target audiences that have received information about USAID or its programs in the past 12 months

Please study the illustrative Results Framework to see how IR 3 has three Sub-IRs and Indicators (Sub-IR 3.1-Sub-IR 3.3) that are necessary and sufficient to achieve increased accessibility of information.

You will note that Sub-IRs 3.1, 3.2 and 3.3 are also Sub-IRs for IR 2. This often happens when building a Results Framework: one or more Indicators may be a "cross-cutting" Indicator that are relevant to more than one IR.

Action: Create a list of desired situations that will make your Mission Communications Objective true by definition and put each into an IR box.

Action: Create a list of desired situations that will make your IRs true by definition and put each in a corresponding Sub-IR boxes.

Action: Create one or more Indicators for each IR and Sub-IR.

TARGET AUDIENCES

As mentioned, the Results Framework provides the strategic structure for your Plan, but the Mission Communications Plan itself is a narrative. It builds upon the Results Framework, providing context and explanations of reasoning, and spelling out other critical information such as the activities or Tactics you will use to achieve the Sub-IRs and IRs, and ultimately the Mission Communications Objective.

One prerequisite for determining Tactics is deciding with whom you need to communicate.

Action: Write down specific audiences you've targeted to date. Don't spend more than a minute doing this.

Before we move forward, try this exercise. Imagine rocks on a beach that stretch as far as the eye can see. Your first impression is that rocks are rocks. Upon closer examination, however, you see there are rocks of every shape, color, size and composition. Depending upon what use you have for collecting them, some are more "valuable" than others (e.g., smooth ones are better if you are making a stone necklace). It would certainly be a huge waste of time and energy to pick up just any rock if what you need are only stones that are round, smooth, green and 3mm or larger. Selectivity becomes important when you have a result in mind.

Often, communicators refer to the "general public" as their target. But *targeting the general public is inefficient at best*. You do not need, nor is it usually possible, to reach each and every citizen of the country in which you are working. But there are segments of the population that you do want to, and can reach. Based on one or more common characteristics such as gender, geographic region, age and occupation, start narrowing the general public down into potential audiences.

You might be wondering why we didn't explore Target Audiences before getting to the Results Framework. After all, we discussed Target Audiences in the Mission Communications Objective, the Intermediate Results, the Sub-Intermediate Results and the Indicators. There is no question that you've had to be thinking about Target Audiences all along, but because the very concept of targeting audiences summons a knee-jerk response having to do with the frustration of having limited resources, and that frustration can disrupt a strategic thought process, we've waited until now to dive deep. Hopefully, an example will help clarify what you need to do next.

Let's say, regarding the IR of "Increasing Accessibility" you want to reach more rural dwellers who previously have not had access to the information coming out of the Mission. To achieve the Sub-IR of "effective events planning in alignment with the target audiences," you decide to set up events in more rural areas. But who are you trying to reach? In this case, it seems obvious that it would be rural dwellers in X, Y and Z. However, this is where things may get tricky.

You have to think simultaneously about Tactics and Target Audiences. Here's why. You need to reach rural dwellers to get them to know about an event so they can learn about USAID. But if you could reach them directly (to invite them to the event), you could probably message to them directly (instead of through the event). So even though your Target Audience is rural dwellers, you may have to use a less direct approach…one that's able to get to the rural dwellers you cannot reach directly.

Let's suppose the regions X, Y and Z are made up of many tribes. You might have to work through tribal leaders as "intervening publics," or people that can help with the communications process by serving in the role of middleman to your ultimate target audience, the rural dweller. For example, if you could communicate with tribal elders, each elder could pass information along to his/her tribe's people in the region

when they occasionally visit with the elder. As you can see, your Target Audience for the event itself is the rural dweller, but you may need to base your outreach first toward the intervening public of tribal leaders.

Action: Make a new list of Target Audiences, one for each IR and Sub-IR. Use existing audiences, as appropriate, but add to each list new potential audiences. Define these audiences as rigorously as possible. You will include this list in your narrative when writing out the Mission Communications Plan.

It must be recognized that some of the Mission activities you are responsible for may not target a specific audience and may not even be necessary for you to achieve any IR or Sub-IR. This chapter does not mean to suggest that these "off-the-framework" activities are "wrong," but they are exceptions to the rule. They are not exceptions that in any way prove you do need not be strategic or have a plan.

MESSAGES

You've determined the Target Audiences you need to communicate with; next you need to craft *customized* messages for each Target Audience that are *clear* and *substantiated*. First, get people's attention by appealing to their self-interest, then present your point in an understandable manner, and finally provide support for your point.

You can do this with a one-two punch: a primary message (or several) followed by several secondary messages supporting the primary.

Primary Messages

Think of a primary message as a sound bite. It's concise but encompasses a big point. It is the "takeaway" for the Target Audience.

Action: For each Target Audience, write one or more primary messages. Each primary message should be one or two sentences and be general but comprehensive in some way.

> For example, for a rural small holder farmer: The American people fund programs through USAID that help [CountryX] farmers grow food to feed their families and generate income.

Secondary Messages

Secondary messages "prove" the primary statement with relevant facts, statistics, examples or testimonials. You may find that holding discussions with program officers and partners is helpful in coming up with the details for secondary messages.

Action: For each Primary Message, write three secondary messages.

Using the example above, here are some secondary messages:

The USAID-funded [ABC] program provides 1,000 farmers a year in [Country X] basic irrigation equipment that raises yields and mitigates the effects of drought.

[FarmerX] used to be able to grow only enough food to feed his family. He participated in training program funded by the American people where he learned new agricultural techniques and basic business skills. As a result, he now has a viable small business.

Working with farmer associations, USAID is helping small holder farmers access export markets where they can earn up to 50% more for the produce they sell.

USAID's tag line "From the American People" need not be used verbatim, but should be at the core of your primary and secondary messages.

APPROACHES AND TACTICS

At this point, you know who you want to reach and what you want them to know.

Now it is time to figure out how to get your Key Messages to your Target Audiences. Start by first thinking very generally about a given Target Audience and the ways they acquire information or make themselves available for a communications interaction.

Some examples of general approaches include:

● Events

● Digital platforms

● Media (as an intervening public)

● Other intervening publics and influencers

The point of thinking about approaches is it will help unleash your creativity and open your mind to new ways to reach your Target Audiences.

All that is left is to decide upon which specific Tactics you need to engage in using the general approaches you've identified.

If using events is an approach, consider different types of events. Here are some examples:

● Ribbon cuttings

● Program launches

● Youth sporting activities with USAID-branded giveaway items like balls

● Entertainment presentations with prominent USAID banners

If using digital platforms is an approach, consider every type of digital platform that a specific Target Audience might use, which would give you a way to reach them. Here are some examples:

● E-mail

● E-newsletters

● Mission website

● Mission blog

● Influencers' blogs

● Twitter

● Facebook

● Flickr

● YouTube

● Branded flash drives with information about USAID

● SMS

If using media is an approach, consider all the types of media that might be used. For example:

● TV, including national, regional, local and cable

● Radio, including national, regional and community

● Newspapers

● Magazines

● Internet news outlets (such as blogs, websites and Twitter feeds)

Taking TV for example, you might:

● Write and disseminate media advisories for planned events

● Write and disseminate press releases to generate coverage of major news items

● Produce and distribute public service announcements (PSAs)

● Pitch reporters/producers on stories covering particular projects

● Shoot and provide video b-roll

● Media train Mission or project leadership and arrange on-camera interviews

Regarding intervening publics, are there community influencers, such as well-known bloggers, a leading editorialist, a community or NGO leader, a tribal chief, teachers or medical providers who can pass Messages along? For example, if primary school children are a Target Audience, you might find it most effective to pass Messages through teachers. In this case, teachers are not a Target Audience, but a strategic channel to reach your Target Audience.

Action: Make a bulleted list of Tactics. You may decide to put these Tactics on your Results Framework, too.

> For example, for the Sub-IR increasing media relations across the range of local media outlets some tactics might be:
>
>> Call new media outlets each week until you've reached two new journalists that show an interest in USAID each week
>>
>> Take four new journalists each calendar quarter to a project site

Hopefully you've just had a revelation. **The TACTICS you engage in that are directly relevant to achieving a Sub-IR or IR will improve the associated Indicator, and those Tactics therefore are most strategic for they ultimately are part of a process that will achieve the stated Mission Communications Objective.**

If you've been reading this chapter and wondering why tactics (which are so significant in your day-to-day work) seem to have been ignored until now, the answer is hopefully now evident. Tactics are most valuable when they are strategically-focused, and the only way to determine their strategic value is when an Objective is set and IRs and Sub-IRs are established.

Action: Now take a 30,000 foot view of your entire Results Framework. If your causal logic is rock solid and your wording is extremely precise, you should be able to "connect the dots" per the chart below. At any tier, if you ask yourself "why do this?" it should be answered on the next higher level. At any tier if you ask yourself "how will this come about?" the answer is on the next lower level. It will very likely

take several revisions of the Results Framework to get it just right.
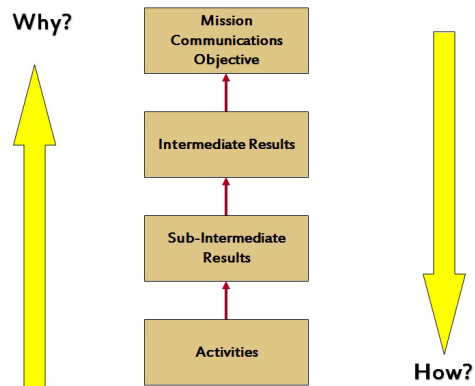
A CALENDAR

Mapping your Tactics to a calendar lets you more easily determine if you have adequate human resources (that may just be you, of course) to carry out everything you've put into your plan. You will find that while some Tactics have to take place during a particular day, week or month, others can be moved around.

Working with a pencil and printed calendar is perfectly fine, as is using Excel to create a grid for a calendar (software to generate a Gantt chart can be helpful but requires an investment of time to learn).

Below is an example of what a portion of a planning calendar might look like.

Mission Communications Calendar				
Calendar Quarter	Jan-March	April-June	July-Sept	Oct-Dec
Sub-IR 2.6 & 3.3	Increased media relations across range of local media outlets			
Outreach to journalists				
Work with program officers to identify content for journalist roundtables and sites for journalist visits				
Prepare collateral, talking points and presentations				
Identify and invite journalists to roundtable				
Hold roundtables				
Coordinate with program office and PAS on site visits				
Invite journalists to sites				
Site visits				

Action: Put Sub-IRs/IRs and Tactics on the vertical axis and the four calendar quarters (or the 12 months) running across the horizontal axis, and mark off boxes showing when time is required to plan for as well as execute each Tactic.

BUDGET

Budgeting comes at the end of the process, after you have created a well-sorted, logically-sequenced and results-based plan. This may seem counter-intuitive to those of you who have had to fight for any type of funding before. You may be thinking, "Why create a 'blue sky' plan that costs X when I've come to expect that the most the Mission will spend on communications is a small percentage of X?"

With a Results Framework and Mission Communications Plan in hand, you may get an entirely different kind of reception. You can show what you will accomplish and what it will cost—and do so in a perfectly logical and substantiated manner—**so your odds of procuring funding go up exponentially.** Don't limit your ambitions or your creativity by starting your plan with a budget and backing into a plan.

Action: List Sub-IRs/IRs/Tactics on the vertical axis and the Detail/Cost-per-item/Total-line-cost on the horizontal axis.

AN ITERATIVE PROCESS

Managing for results is not a one-time activity. In fact, it is a cyclical process that brings results to the center of all planning. When it comes to executing the Plan, there will inevitably be variables you didn't think of during the design. Some things will not turn out the way you had good reason to expect they would. That's fine because you will follow an iterative process of redirecting when you are blown off course. A single pass of the process looks like this:

1. Define results

2. Identify performance indicators

3. Develop a Performance Management Plan, or PMP (see Chapter 14)

4. Collect performance data

5. Analyze performance data

6. Use analysis to inform decision making

When you hit step #6, you bounce back to step #1. This approach gets you closer and closer to achieving what you've set out to achieve.

NARRATIVE

If you worked your way through the steps in this chapter so far, congratulations! You now have a Results Framework and substantial building blocks for a Mission

Communications Plan. So that others can understand how you arrived at your recommendations, more narrative is required.

Action: Write a narrative "around" the outputs from all the previous Action steps, expanding with any insights (such as those gleaned during the background research step) and decisions you made along the way (why potential target audiences you were considering didn't make the final cut, for example). This will reinforce the logical basis of the plan, so it can stand alone and be 100% comprehensible to someone new to the Mission. Finally, add a one-page Executive Summary to the beginning and any relevant supporting documents to the appendices (such as primary or secondary research reports). This is your Mission Communications Plan.

CONCLUSION

You've done the research, set an overarching Mission Communications Objective, thought through the Intermediate Results and Sub-Intermediate Results you need to realize the Mission Communications Objective, figured out who you must communicate with and what they need to know, prioritized Tactics to get your Key Messages to your Target Audiences, figured out what it will cost, mapped it out on a calendar, and put a measurement and analysis protocol in place to see how well things go during execution so you can redirect as necessary to get the results you want.

In the end, you will generate expected positive benefits for your Mission and the Agency as a whole. In the days, weeks and months that follow, you should find that your life as a USAID communications officer is less stressful, more predictable and hopefully much more rewarding as a result of this effort. Whenever you ask yourself the question "is this particular activity worth doing?" you have an objective foundation for answering.

Moreover, your Mission Communications Plan will demonstrate that communications professionals are very much like other programmatic professionals at USAID and should be treated the same. Because you are thinking like program staff in planning for results, using a framework and measuring your progress, odds are program staff will start thinking like you in valuing communications as an integral, cross-cutting and necessary part of development.

The bottom line is that a Mission Communications Plan will serve as a reliable compass to guide your work as a USAID communications professional each and every day, and will generate expected and specific benefits to the Mission and the Agency.

RESOURCES

● [USAID Program Cycle Overview, December 9, 2011](#)

● [Project Design Guidance, December 9, 2011](#)

● [CDCS Guidance](#)

● [Policy Framework for 2011-2015](#)

● [TIPS Series on Performance Monitoring and Evaluation: Building A Results Framework](#)

● [TIPS Series on Performance Monitoring and Evaluation: Selecting Performance Indicators](#)

● [Evaluation Statements of Work, Good Practice Examples, August 2011](#)

● [Additional USAID Evaluation and Performance Management links](#)

Appendices

Sample Position Descriptions for Development Outreach and Communications Officer

POSITION DESCRIPTION

Senior Development Outreach and Communications Officer, USAID/(country)

1. INTRODUCTION

The Senior Development Outreach and Communications Officer (DOC) reports directly to the USAID/(country) Deputy Mission Director and works with Mission and Embassy leadership and staff to implement development, outreach, and communications efforts to increase awareness of USAID assistance programs in (country). S/he leads the development, outreach, and communications team in (city), which at full strength comprises (staffing structure).

The DOC liaises with the U.S. Embassy's Public Affairs Section (PAS) to ensure consistency in messaging and strong coordination between USAID and other USG colleagues under the U.S. foreign assistance umbrella. The DOC also serves as a 'translator' of complex USAID processes (e.g. budget, procurement, project design, etc.) to the broader interagency audience to ensure the intricacies of those processes are conveyed to the final recipient whether it's a journalist, the Ambassador, or a visiting Congressional Delegation. Washington-based offices requiring close contact and coordination include the Office of Afghanistan and Pakistan Affairs (OAPA) and the Bureau for Legislative and Public Affairs (LPA). The position will also coordinate with other interagency and implementing partners.

2. BACKGROUND

USAID/(country) manages one of the most complex development programs in one of the most demanding environments in the world. (Provide detailed and up-to-date history of U.S. development assistance in country.)

USAID works closely with the interagency team at the U.S. Embassy and is a critical component to our work in (country). (Provide detailed and up-to-date history of work with Embassy, interagency partners, stakeholders, and media.)

3. DETAILED DUTIES AND RESPONSIBILITIES

The DOC will manage the full range of public information and outreach activities in support of USAID/(country)'s programs and objectives, targeting information to specific audiences in both the U.S. and (country), in accordance with the Mission's

public strategy and evolving circumstances.

Specific duties include but are not limited to the following:

Supervisory and Coordination

• Lead the Mission's Development Outreach and Communications (DOC) team comprised of (how many DOCs) to ensure overall quality and coherence of the team's communications and outreach products and initiatives. This includes (Fill in staffing structure for USAID/(country).)

• Lead the development and implementation of the Mission's communications strategy and outreach plan.

• Represent the Mission at the senior level in all matters pertaining to public affairs and outreach activities with other branches of the USG, the Government of (country), implementing partners, other donor nations, the UN, World Bank and other groups or institutions.

• Train USAID's technical staff in (Country/city) and the regional offices (if appropriate) in support of their public speaking and media outreach roles. Oversee the integration of communications in the project design and implementation processes.

• Serve as the senior advisor to Mission management regarding all public information, media relations, and outreach matters.

• Maintain up-to-date knowledge of all USAID/(country) activities and processes, as well as a keen awareness of political and policy issues.

• Advise USAID staff and implementing partners on developing appropriate public information programs and initiatives.

• Serve as a resident expert on USAID branding and style guidelines, ensuring regulations are followed by recommending revisions and appropriate application as outlined in ADS 320 and the Agency's Graphic Standards Manual.

• Oversee and provide regular trainings to USAID staff and implementing partners on the appropriate use of branding and marking; work closely with C/AOTRs to ensure adherence to branding in the field; and, seek guidance from LPA on any disputes or waiver requests.

Public Information and Publicity Materials

• Coordinate with the PAS, U.S. Military, other USG agencies (e.g. Treasury, Commerce, Agriculture), and USAID implementing partners to achieve maximum exposure and understanding of U.S. development and humanitarian assistance efforts and initiatives in (country), as defined by the Chief of Mission and USAID Mission

Director.

• Establish and maintain contacts with donor representatives, implementing partners, and other USG agencies to collect information for reports.

Public Information and Publicity Materials

• Coordinate information dissemination, media outreach, and public events within the Mission; with the Mission's offices, units and technical staff; and with all non-USG organizations.

• Oversee the drafting, editing, and dissemination of timely and accurate information, fact sheets, press releases, newsletters, brochures, presentations, responses for requests for information, and all other public information materials relating to USAID/(country)'s activities. These must be written in clear, concise English, and to the extent possible Urdu and other local languages, prepared with both the media and general audiences in mind, and designed for print, power points, and web use.

• Oversee the preparation of a bi-weekly summary of events, submissions for the Weekly Administrator's Report, and submissions for USAID Frontlines and other USAID public information platforms including the Administrator's Blog, Facebook, Twitter, YouTube and other new or emerging social media sites.

• Oversee the use of social media platforms as an engagement tool with a focus on digital advocacy and outreach; a social media strategy will be developed to complement the broader communications plan.

• The DOC will manage the preparation and maintenance of an updated standard information package on the USAID program in (country) for briefings and for distribution to the public and the media; and for USAID/W, LPA, State, Congress, etc.; including scene setters, program briefing papers, project status reports, maps, photos, information about other donors, and general information about (country).

• S/He oversees the maintenance of the Mission's English-language web materials to ensure they are accurate and up-to-date.

• Oversee the writing and distribution of press releases on program successes, project inaugurations, significant developments, etc. Follow up with media to encourage and support coverage of public events. Coordinate with technical offices, Embassy's PAS, and LPA to produce and release timely, accurate, and useful written information to local and international media.

Media and Public Relations

• Promote separate, pro-active, targeted, information and media outreach activities. These activities are specifically designed to push accurate information about USAID programs deep into local, regional and national markets, through the selective use of radio, television, newspapers, magazines, public service announcements, advertise-

ments, billboards; and traditional communications.

• Oversee all international and local media relations. Work closely with PAS on press relations and maintain contacts with high-level Western and local journalists from all media outlets.

• Advise and work with Embassy PAS to expand opportunities to keep media abreast of USAID/(country) programs, including TV, radio and other media. This may include arranging interviews, briefings, media tours of USAID projects, etc.

• In collaboration with PAS, advise the Mission Director and USAID staff on press and media relations. Ensure a targeted, coherent, and consistent message from all USAID staff and implementing partners.

• Coordinate with Government of (country) public relations offices, maintaining good relations and advising on working with (country) and international media.

• Supervise the monitoring of the local and international press coverage, awareness, and attitudes concerning USAID programs and monitor effectiveness of the communications strategy. Provide feedback to inform ongoing activities and future programming.

• As directed by the Mission Director, Deputy Director and in collaboration with PAS, respond to inquiries from the general public, media, and other sources about USAID programs and projects.

Publicity Events

• Organize and coordinate press events for USAID projects in conjunction with the PAS, USAID Mission Director and Deputy Director, technical teams, and implementing partners. This includes conferences, openings, ribbon-cuttings, and other ceremonies. Write press releases, speeches, and talking points; organize background briefings for media; compile and disseminate press packets; deal with protocol issues, site selection, staging, and logistical issues; identify and schedule speakers; liaise with U.S. and local government officials; write or edit Briefing Checklists (BCLs), scene setters, briefing materials and memorandums to the Ambassador or his/her deputies when participation in events is warranted; write or edit BCLs and Scene Setters for USAID's Front Office when participation in events is warranted; provide on-site coordination of media. Follow up with media to ensure coverage of public events. Manage the posting of all event information and materials to the Mission website.

• Review and edit press releases, speeches, and talking points drafted by implementing partners for USAID events; review and edit BCLs and Scene Setters drafted by implementing partners for USAID events.

• Submit all press releases and interview requests – in-house and those drafted by

implementing partners – to PAS (and LPA, when appropriate) for review and approval.

• Oversee the maintenance of a calendar of USAID program events and its distribution within USAID/(country), to Embassy stakeholders, and to OAPA and LPA in Washington.

• Photograph and/or shoot video of USAID events for the USAID and Embassy websites and for USAID/(country)'s archives.

• Serve as the Mission's primary point of contact for publicity events and site visits by official visitors from the U.S. Embassy, USAID/Washington, Congress, and other USG agencies or entities. Coordinate VIP site visits as necessary. Coordinate with Embassy on schedules and logistics. Lead the preparation of briefing materials, scene setters, and other information products and processes to support these visits. Maintain a diverse list of potential site visit locations appropriate for a variety of CODEL, STAFFDEL, and other high-level visitors to USAID/(country), coordinating closely with partners in advance.

• Perform other duties/activities that the U.S. Ambassador, USAID Mission Director and Deputy Director, USAID/Washington and circumstances may dictate.

4. MINIMUM REQIREMENTS

A. Required Minimum Qualifications and Selection Criteria

Education: It is preferred, but not required, that the candidate hold a Master's degree with significant coursework in relevant fields. Relevant fields include – but are not limited to – journalism, communications, public relations or affairs, international relations, international development, public administration, development/area studies, and social studies. At least eight to 10 years' experience as a journalist, in public affairs or international relations is required.

Work Experience: The candidate must have at least five years' relevant experience in a developing country. Relevant experience is defined as work in journalism, public relations, communications, and/or outreach.

Language Proficiency: The candidate must be fluent in both spoken and written English. Familiarity or fluency in (local language/s) is not required, but looked upon favorably.

Skills and Abilities: The candidate must have a demonstrated capacity in the following skills and abilities:

• Demonstrated ability to exercise sound, independent, professional judgment.

• Excellent organizational and critical thinking skills.

- Excellent written and verbal communication skills with a demonstrated ability to translate highly technical material into easy to understand narrative.

- Exceptional interpersonal skills with the ability to influence relationships positively.

- Superior project management skills and the ability to take initiative working with the direction of management; must be able to take ownership of projects, creatively problem solve and see through to completion.

- Strong and demonstrated knowledge of the principles and practices of public relations, media relations, and journalistic writing and reporting techniques.

- Knowledge of technical aspects involved in the production of different public outreach activities, such as production of televised programs.

- Maintain superior levels of professionalism while working under pressure in a fast-paced and sometimes difficult or dangerous environment.

- Willingness to assume duties and responsibilities in all communications areas, as needed.

- Strong, working knowledge of Microsoft Word, Excel, Power Point, and Internet applications.

- Familiarity using a digital camera and videotaping equipment.

- Must be a U.S. citizen.

- U.S. Secret security clearance (or the ability to attain one) is required.

5. SELECTION CRITERIA AND PROCESS

Applicants who do not meet the required minimum qualifications will be considered unqualified for the position and will not be assessed using the additional selection criteria below.

All other applicants will be scored, and then ranked based on the following selection criteria:

Technical Knowledge / Work Experience (40 points)

- At least eight to 10 years' experience in related fields, such as public relations, journalism, or international development communications.

- Experience supervising staff and work flows, working as a team member, and providing leadership in the areas of his/her competencies.

- Demonstrated success in developing and disseminating information to a variety

of target audiences.

- Demonstrated success in designing and implementing effective public relations/communications campaigns targeted at specific audiences as well as the general public.

- Demonstrated ability to craft information messages in various media formats (press releases, web sites, stories, etc.) targeting a variety of audiences.

- Evidence of broad understanding of issues related to international development and transition economies.

- Extensive writing and editing experience.

- Demonstrated ability to establish and maintain collegial relations with press and media contacts and exercise sound judgment in representing the USG while discussing program activities with the press and media.

- Broad operational planning experience, analytical ability, and the capacity to convert planning concepts into firm plans to meet a variety of contingencies.

- Previous work experience with the USG or another international development organization in an overseas context is highly desirable.

Communication Skills / Group Dynamics (30 points)

Applicant must provide evidence and examples of:

- Effective team leadership skills and the ability to work effectively as a member of a multi-disciplinary, multi-cultural team.

- Ability to make cogent arguments clearly and succinctly in written and oral presentations.

- Initiative and proactive engagement with colleagues to complete assigned tasks in accordance with agreed timetables.

- Ability to work independently, managing several activities at once, and to work under pressure to meet very short deadlines.

- Evidence of outstanding coordination and organizational skills.

Writing Skills (20 points)

Applicants must provide at least two writing samples with their application. The samples should be 350 to 1,500 words (preferably 750-1,000 words). They can be excerpts from larger articles or papers, and do not have to concern development or be written specifically for this solicitation. The samples should demonstrate the applicant's ability to clearly and lucidly communicate complex ideas to the public. The

samples must be by the applicant, co-written articles are not accepted.

Education and Training (10 points)

• A Master's degree is preferred but not required, preferably in journalism, communications, international relations, international development, public administration, development/area studies, social studies or a related field. An undergraduate degree in similar disciplines with additional work experience.

• Training in one or more of the following areas: development outreach and communications, writing, journalism, web site content management, presentation skills, or other areas that are relevant to the detailed duties and responsibilities outlined in Section III of the solicitation.

• Extensive experience with Microsoft Word, Microsoft PowerPoint, and Microsoft Excel. Familiarity with the Adobe Suite, particularly using Adobe Photoshop. Experience with Facebook, Twitter, YouTube, LinkedIn, and RSS feeds.

Total Possible Points: 100

Past Performance / Professional Reference Checks

Applicants must provide at least three references with current contact information, preferably both an e-mail address and a telephone number. The Selection Committee will conduct reference checks of all applicants who meet the required minimum qualifications. The references will be asked to provide a general assessment of the applicant's suitability for the position. It is the responsibility of the applicant to ensure submitted references are available to provide a written or verbal reference in a timely manner.

In addition to comments from references, the Selection Committee will take into account awards or other evidence of outstanding performance in any areas related to the above selection criteria.

POSITION DESCRIPTION

Development Outreach and Communications Specialist, FSN-0105

INTERAGENCY FOREIGN SERVICE NATIONAL POSITION DESIGNATION					
Prepare according to instructions given in Foreign Service National Handbook, Chapter 3 FAH-2 H-400					

1. POST	2. AGENCY	3. POSITION NO.
TBD	USAID	TBD

4. REASON FOR SUBMISSION

☐ a. Reclassification: This position replaces

Position(s) No. _____ , _____ (Title), _____ (Series) _____ (Grade)

No. _____ , _____ (Title), _____ (Series) _____ (Grade)

☐ b. New Position

☐ c. Other (explain). To record the gradual accretion of additional duties and responsibilities.

5. CLASSIFICATION ACTION	Position Title and Series Code	Grade	Initials	Date
a. Post Classification Authority				
b. Other USAID EXO	Development Outreach and Communications Specialist, FSN	FSN-XX		
c. Recommended by Initiating Office				

6. POST TITLE OF POSITION (if any)	7. NAME OF EMPLOYEE
	TBD

8. MISSION OR OFFICE	c. Third Subdivision
USAID/Mission	N/A
a. First Subdivision	d. Fourth Subdivision
Program Office	N/A
b. Second Subdivision N/A	e. Fifth Subdivision N/A

9. This is a complete and accurate description of the duties and responsibilities of my position.	10. This is a complete and accurate description of the duties and responsibilities of this position
_____ _____ Signature of Employee Date	N/A _____ _____ Signature of Local Supervisor Date
11. This is a complete and accurate description of the duties and responsibilities of this position. There is a valid management need for this position.	12. I have satisfied myself that this is an accurate description of this position, and I certify that it has been classified in accordance with appropriate Foreign Service National Handbook, Chapter 3 FAH-2 H-400 standards.
_____ _____ Signature of American Supervisor Date	_____ , USAID EXO Signature of Administrative, HR, or Executive Officer Date

13. BASIC FUNCTION OF POSITION
See attached:

14. MAJOR DUTIES AND RESPONSIBILITIES
See attached:

(continue on blank sheet)

13. BASIC FUNCTION

The Development Outreach Communication Specialist (DOCS) (Specialist) reports to the Program Officer and/or his/her designee, and collaborates closely with the Mission Director, Deputy Director, SO Team Leaders, and implementing partners (IPs) to develop and implement the overall Mission communications strategy. The Specialist collaborates with the U.S. Embassy Public Affairs Office (PAO) to ensure that Embassy personnel are properly apprised of USAID public activities and projects; and, serves as principal liaison with the USAID/Washington Bureau of Legislative and Public Affairs (LPA). The USAID/XXXX Mission manages the USG development program in XXXX, with a program budget of approximately US$XXXX per annum. The Mission portfolio includes a broad range of energy, economic growth, democracy, health and education, and humanitarian program activities (OR AS APPROPRIATE). The Specialist supports the Mission in the achievement of its objectives by producing and disseminating public information about Mission programs/projects/activities in XXXX, and educating and promoting a better understanding of USAID programs. The Specialist is responsible for collecting, investigating, managing, and distributing information associated with the USAID foreign assistance program in XXXX, and serves as the primary Mission point of contact and liaison for information requests.

14. DUTIES AND RESPONSIBILITIES
a. Communications Management and Strategic Planning – 60%

The DOC Specialist is responsible for contributing to policies and procedures for Mission communications and outreach that clarify roles and responsibilities within USAID and with other Embassy sections and IPs, including templates for various communication tools, standards for creating and finalizing DOC materials, and guidelines for planning and managing events. The Specialist is responsible for the drafting of original and annual updates to, and the implementation of, the Mission communications strategy, identifying objectives, messages, audiences, products, and budgets, and developing plans in coordination with USAID managers and technical teams consistent with the Mission development strategy and the overall Embassy communications strategy. The Specialist leads in the design of public information products, ensuring that Mission communication products contain appropriate and consistent messages that support the approved Mission communications strategy; and, provides quality control on all print and electronic public information materials such as the external website, organizational brochures and information packets, and briefing books produced by the public relations contractor and other USAID staff.

1. Media Relations: The Specialist is responsible for Mission media activities; liaising with the US Embassy PAO Press Office, and working closely with PAO staff and the FSN Public Relations Specialist to generate press coverage of USAID activities in XXXX. The assignment includes arranging and preparing for press interviews,

press conferences, briefings, tours of programs/projects/activities, and interaction with host-country and American journalists. The Specialist tracks USAID program/ project/activity milestones and events to ensure that appropriate press coverage is provided; advises the Mission Front Office and staff on press outreach priorities, and whether coverage is culturally and politically appropriate; oversees and produces media materials (including news releases, backgrounders, and fact sheets) designed to inform editors and reporters of technical programs/projects/activities and their achievements; coordinates with technical offices and with the Embassy PAO PO to produce and release timely, accurate, and useful written material for the host-country and American media; and, advises and works with the PAO to expand opportunities for coverage of USAID efforts. The Specialist helps technical offices to define activities for coverage, participates in field visits to assess newsworthiness, and accompanies the press to interviews and site locations for filming.

2. Public Events and Visitors: The Specialist plans and executes activities to present Mission programs to the public and to VIP visitors, including a range of communications tools and distribution to a variety of audiences. The Specialist prepares visits for high-level officials to highlight key USAID programs/projects/activities and strategies; and, provides or supervises advance work for planning, including scheduling, coordination with SO Teams (and other Embassy Sections as appropriate), and overseeing the production of briefing materials and trouble-shooting during VIP visits. For project site visits or events that involve the Ambassador, Deputy Chief of Mission, and/or the USAID Director or Deputy Director, the Specialist ensures that all event information (e.g., scene setters, talking points, speeches) have been prepared, and meet quality standards and time requirements. The Specialist coordinates and consults with technical offices on program/project/activity signing ceremonies or other milestone events, including finalizing press releases and ensuring logistics are handled.

b. Publicity Materials – 40%

The Specialist is responsible for the production of high-quality print and electronic communications products that translate complex messages and technical information into understandable, meaningful messages that resonate with a variety of audiences, both host-country and American. The Specialist serves as editorial director of all published and website materials, including information brochures, special publications, and the external USAID/XXXX website; manages a small public relations contractor in producing graphic designs, written text, photographs and other outsourced products; and, ensures that contractor tasks are completed in a cost effective, high-quality, and timely manner. The Specialist oversees and develops regular and specialized information materials for Washington opinion leaders and audiences, in coordination with the Regional Bureau and LPA colleagues; travels to USAID program/project/activity sites throughout the host country and the region to

interview beneficiaries and photograph programs/projects/activities for the USAID website and for news releases; serves as Mission PoC for Agency Branding Graphic Standards, within USAID/XXXX and among partners; prepares and keeps current a packet of informational materials communicating Mission strategic priorities and focus areas; acts as editor for key reports and documents, as assigned; ensures that public outreach products include people-oriented success stories that "tell our story" to external and internal audiences, and are politically and culturally appropriate; and, manages the external web site in coordination with the USPSC Specialist, ensuring that information is "fresh," current, and inviting to browsers.

Performs other duties as assigned or required.

15. DESIRED MINIMUM QUALIFICATIONS

a. Education: A Bachelor's of Arts Degree in journalism, public relations, communications, English, or a related field is required. An advanced degree in a related field is desired.

b. Prior Work Experience: A minimum of five to seven years of progressively responsible experience in communications, public relations, or journalism, in an English-language work environment, is required. This experience should provide assurance that the DOC Specialist is skilled in disseminating information to a variety of target audiences. Previous work with the USG or another international development organization is highly desirable.

c. Post Entry Training: The Specialist will receive on-the-job training on established USAID procedures, regulations, and policies governing Mission interaction with the media, IPs, other USG agencies, etc. The Specialist will attend USAID regional Development Outreach and Communications Workshops, subject to course offerings and the availability of funds.

d. Language Proficiency: Fluent (level 4) in English and in the primary local language(s), both written and oral, is required.

e. Knowledge: The Specialist must have a thorough knowledge of the principles, methods, practices, and techniques of communication, and skill in applying such knowledge to develop written information materials for dissemination through a variety of media, in order to determine and effectively use the most appropriate means for transmitting information, and to evaluate the effectiveness of plans developed to communicate with targeted audiences. This includes an understanding of the use of written communication in developing news releases, feature stories, background statements, fact sheets, media spots, and scripts that effectively transmit information about complex USAID/XXXX programs/projects/activities and functions.

The work requires a solid understanding of websites; an excellent knowledge of English grammar and American word usage and spelling; a good knowledge of graphic design, printing, and publishing processes, and the ability to oversee printers and/or publishers; a general understanding of procurement processes; and, a broad understanding of issues related to international development.

f. Skills and Abilities: Work requires skill in developing and maintaining effective relationships with media representatives, and the public affairs personnel of organized groups, and in establishing and enhancing communication between USAID and its audiences using media and groups; skill in making oral presentations designed to seek cooperation of specialized groups and media in providing fuller coverage to USAID/XXXX programs/projects/activities, and to encourage open communication between USAID/XXXX and its audiences; and, skill in analyzing the effectiveness of communication plans once implemented, and developing recommendations to change the nature of the USAID/XXXX public affairs program. The work requires excellent oral and written communications skills, including news and technical writing, editing, and research skills; strong organizational and project management skills, that may be applied within a multi-cultural work environment; and, the ability to work independently, taking initiative once guidance is provided, and managing several activities simultaneously and under pressure to meet deadlines. The Specialist must have strong interpersonal skills. The ability to establish and maintain collegial relations with press and media contacts, as well as Embassy and IP counterparts, and to exercise sound judgment in representing the USG is demanded, along with the ability to manage interactions with high-level dignitaries and officials with maturity and confidence. The ability to travel throughout the host country, in order to organize and implement outreach events and visit project sites, is a requirement of the position. Very good computer skills, including the use of MS Office, MS Outlook, MS PowerPoint, and Word are required. In addition, a basic familiarity Web design, Dreamworks, Acrobat, and other page making software is highly desired.

16. POSITION ELEMENTS

a. Supervision Received: The DOC Specialist works under the general supervision of the USAID/XXXX Program Officer and/or his/her designee. The Program Officer sets the overall assignment objectives, program emphasis, and resources available. The Specialist, in consultation with the Program Officer, develops the nature of the communication plans, deadlines for implementation, and the various phases to be achieved. The Specialist, having developed expertise in carrying out the communications program, has continuing responsibility for independently planning and executing the various phases or stages of the plans, coordinating efforts with program specialists and the U.S. Embassy PAO, and making contact with media and special-ized group representatives. The Specialist resolves most of the problems or conflicts that arise, consulting with the Program Officer and/or the PAO where policy has not

been established.

Completed work is reviewed by the Program Officer for adherence to established policy, and meeting the expected goals of the communication plan.

b. Available Guidelines: The Specialist must remain familiar with the USAID ADS, AIDAR, FAR, Handbooks, Mission Orders, USAID/Washington Bureau and LPA outreach guidance, and established USAID/XXXX and Program Office procedures and regulations; and, media and communications papers prepared by USAID/Washington and the Department of State.

c. Exercise of Judgment: Projects assigned to the Specialist include a variety of duties and processes requiring the exercise of extensive judgment; judgment is required in providing guidance to USAID technical teams, and to IPs and other contractors and grantees on USAID policies and procedures related to the Mission communications strategy, and to other mission USDH, USPSC, and FSN staffs. Independent judgment must be exercised on a broad range of communications and media issues and when meeting with media representatives, and with GoXXXX, NGO, and IP counterparts, and with other donors. The Specialist is expected to analyze situations and develop ways to resolve problems. The Specialist advises superiors in the Mission and the U.S. Embassy on the implications of DOC programs.

d. Authority to Make Commitments: The Specialist may make administrative arrangements consistent with ADS guidance and Mission policy, and take action and establish priorities based on available guidelines and professional judgment. Guidance is sought when needed, and superiors informed of activity status. Within the scope of the authority delegated, the Specialist negotiates outreach and communications activities with counterparts in the Mission and the U.S. Embassy.

e. Nature, Level and Purpose of Contacts: The Specialist works closely with the Program Officer and/or his/her designee who will oversee the Specialist's work as it relates to the USAID/XXXX Communication Strategy. The Specialist coordinates closely with USAID/XXXX Strategic Objective Teams, Team Leaders, Embassy and Consulate/Public Affairs personnel, mid- and senior-level officials of IPs, beneficiaries, host-country citizens, host-country NGOs, and host-country private-sector officials for the purpose of implementing the Mission Communications Strategy, and fulfilling Mission outreach goals. In many cases, the Specialist will represent USAID/XXXX in these discussions.

f. Supervision Exercised: Formal supervision of other Program Office staff is not contemplated.

g. Time Required to Perform Full Range of Duties After Entry Into the Position: One year.

Sample USAID Press Guidances

USAID Press Guidance
August 25, 2003

LIBERIA HUMANITARIAN UPDATE

Please provide an update on humanitarian efforts in Liberia.

● Humanitarian aid efforts continue in Liberia.

● Many of the humanitarian supplies that arrived in Monrovia on Friday, August 15th, are to be used in a targeted distribution to groups identified as having greatest need, including IDP settlements in Monrovia and Harbel/ Firestone, orphanages, and medical clinics. These are being distributed by non-governmental organizations and international organizations including Medical Emergency Relief International (Merlin), Action Against Hunger, the International Committee for the Red Cross, the International Rescue Committee, and Save the Children Fund.

● Humanitarian supplies will only begin moving into the interior of the country once security conditions permit.

● On August 20, USAID implementing partner Merlin, Médecins Sans Frontières (MSF)-Holland, and the Catholic Mission traveled in a convoy to Buchanan to assess humanitarian needs in the city and its environs. The convoy also transported relief items, including oral rehydration salts, soap, water purification tablets, and intravenous fluids. Merlin national staff in Buchanan estimated that there are 35,000 IDPs at 11 sites within Buchanan and in the surrounding area.

● On August 21, USAID approved funding to the U.N. Office for the Coordination of Humanitarian Affairs (UN OCHA) for a Humanitarian Information Center in Monrovia which will enable NGOs and others to access critical updates on the humanitarian situation.

● On August 21, USAID also approved funding to the U.N. World Food Program (WFP) for a Joint Logistics Center that will negotiate humanitarian access, conduct movement control activities for humanitarian operations, and disseminate logistics planning support.

● In addition, the State Department's Bureau of Population, Refugees, and Migration (PRM) approved contributions on August 18 of $3.8 million to UNHCR, UNICEF, UNSECOORD and WHO to support UN efforts to assist IDPs and refugees in Liberia.

● On August 26, additional Disaster Assistance Response Team (DART) members will deploy to Monrovia based on existing needs in the country to replace departing DART members.

Background

● USAID initially deployed a DART to Monrovia on August 6 to coordinate relief activities. The DART will continue to assess the situation on the ground and work with other donors, international and non-governmental organizations to identify appropriate humanitarian activities for USAID funding.

● Since October 1, 2002, the U.S. government has provided nearly *$21 million* to support humanitarian needs in Liberia. The USAID mission in Monrovia, which remained open throughout the crisis, administers a $6 million development program to improve the quality of health, agriculture and civil society in Liberia.

Drafted: EYount, USAID/Press   24052
         JGiordano, USAID/LPA   info

Cleared: CPratt, USAID/OFDA   ok
         MLange, PRM   ok

USAID Press Guidance
April 22, 2003

AFGHANISTAN ROAD PROJECT

Question: What is the status of the road in Afghanistan?

● Reconstruction of Kabul–Kandahar–Heart road project is well underway and on schedule.

● Design, de-mining, removing old asphalt, and grading has been completed for 49 kilometers of Kabul–Kandahar highway. Even without asphalt, new road allows increased speeds from 35 km/hr to 120 km/hr. Asphalt can not be laid during the winter. Now that it is spring, this process is underway.

● The contract is about to be awarded for the next 50 km segment, and design is nearly complete for the following 96 km, which would complete the originally planned segments for the USG.

● Based on discussions with the Afghan Government, the Saudis and the Japanese, USAID will pick up the segments originally planned for the Saudis and the Japanese, starting approximately 50 km east of Kandahar. By doing this, the US will be able to complete the Kabul to Kandahar highway segment by the end of 2003.

● But this is only part of the overall work done by the U.S. government. We have also:

  • Funded emergency Loya Jirga and Afghan Reconstruction Trust Fund, building legitimacy of new government

  • Exchanged old currency for new Afghani notes across entire nation

  • Built over 4,200 spot reconstruction projects (government buildings, roads, bridges, irrigation systems which also equates into thousands of man-days of labor)

  • Provided wheat seed and fertilizer to 100,000 Afghan farmers, helping achieve an 82% increase in cereal production over prior year

  • Led 2002 Back-to-School campaign for 2.9 million students, 30% of whom were girls

  • Printed 15 million textbooks

  • Rebuilt 150 schools and recently announced plans to refurbish and renovate an additional 1,000 schools over the next three years

  • Distributed training kits for 30,000 teachers

• Immunized 4.26 million children against measles and polio; treated 700,000 cases of malaria

• Supplemented 50,000 teacher and all 270,000 civil servant salaries with food assistance

• Provided health care to 2 million women and children

• Supported over 6,100 water projects (irrigation canal rehabilitation, wells, irrigation systems).

• Providing clean water for one-quarter of Kabul's population, focusing on the poorest neighborhoods. Rehabilitating the water systems of Kandahar and Kunduz which will benefit 700,000 people.

Drafted: EYount, AID x 24052

Cleared: JPryor, AID   ok

Sample Media Guidelines and Event Planning Guidelines

SERBIA AND MONTENEGRO 2003

Note: This document replaces Program Information Officer (PIO) used in the original version with Development Outreach and Communications Officer (DOC).

USAID/Serbia-Montenegro promotes media coverage of U.S. assistance programs in Serbia and Montenegro to increase public understanding of and support for USAID goals and activities. USAID expects its implementing partners to also discuss, promote, and attract positive publicity for our joint activities by planning public events and engaging local media, beneficiaries, and officials from the host-country and U.S. government.

These guidelines are intended to improve our coordination of media relations and public events related to U.S. assistance activities. They are not meant to hinder contractor/grantee media relations, but rather to ensure that we maximize our public education efforts and coordinate our messages.

Media Relations

Given that contracts and grants include specific instructions regarding media interaction and communications products, we would like to propose the following guidelines for dealing with the media in order to help us better coordinate and monitor press coverage.

Interviews with Foreign or Local Correspondents

The USAID Mission strongly encourages activity managers, contractors, and grantees to keep local and foreign media well-informed about assistance activities. We suggest that contractors and grantees inform the Cognizant Technical Officer (CTO) and the Mission's Development Outreach and Communications Officer (DOC) when an American, foreign, or national level media outlet requests an interview regarding activities under a USAID contract or grant. We also request that you inform us when you are planning to publish an opinion piece discussing U.S. government funded activities. The DOC, *(name here)*, can be contacted at the Mission *(phone number here)*, or *(e-mail here)*.

The DOC will then coordinate with the U.S. Embassy or Consulate Public Affairs Officer (PAO) as necessary. All USAID employees are also required to inform the DOC about any of the above.

You must limit your comments in the interview to the activities you are working on. Any question involving U.S. foreign policy (for example, "What does the United States think about the Montenegrin government's economic reform program or the future of Serbia and Montenegro?") should be politely

declined, as these are questions that only an official representative of the Embassy or Consulate can address. You may refer journalists to the PAO in Belgrade.

Attribution to USAID/U.S. Government

Given that contractors and grantees may be partially or wholly funded by the U.S. government through USAID, you must make it clear that you work on a contract or grant for USAID and that funding for your activities comes from the U.S. government. Please be aware that many contracts and grants require all publications and information products (brochures, studies, press releases, etc.) to contain specific mention of USAID funding. Standard provisions state: "USAID shall be prominently acknowledged in all publications, videos or other information/media products funded or partially funded through this award." For the full text go to http://www.usaid.gov/policy/ads/300/303maa.pdf. The language included in contracts is even more specific for media contacts.

Public Events

Involving the U.S. Ambassador, other U.S. government representatives, and host country officials in public events, such as a press conference, ribbon-cutting ceremony, or conference, is an effective method for attracting media coverage. USAID encourages our contractors and grantees to solicit the participation of officials, as well as public opinion makers in project-related events.

Guidelines for planning press events on USAID funded activities are presented below. Please note that events with high level State Department USAID or other U.S. government participation will require additional briefing materials, planning, and coordination time. This is due to the need to ensure that officials in attendance are properly prepared to represent the United States, whether by giving a formal or informal opening, making remarks, or responding to questions. This is the case even when media attention is not the primary purpose for inviting the official. Advance planning, within the time frames presented below, permits USAID to review plans and public information materials for public events, and to clear these materials with the PAO as required. It also allows us all to better share information about our activities.

All requests for the Ambassador or Mission Director's participation in a public event regarding a USAID activity must be coordinated through the DOC in the USAID Mission. If the Ambassador is requested, the DOC will coordinate the appearance with the PAO.

Public events that do not involve official participation should be included on the calendar of events. The implementer should coordinate all public events with the CTO and DOC, who in turn will coordinate with the PAO as necessary. Some events may warrant media coverage and a press release regardless of official participation. The implementers and DOC will work

together to highlight important events and developments to media through press releases and advisories or by pitching a story to a specific media outlet. A comprehensive media relations and outreach plan is being developed to ensure that all activities receive coverage.

The following activities will allow us all to better prepare for high profile public events. Please provide these briefing materials during the time frames indicated for all events involving U.S. government officials, and include all public events in the calendar regardless of official participation.

1. Event Calendar

All entries to calendar should be made 14 days in advance of event.

Please provide the CTO and DOC with a monthly calendar of events highlighting all public activities or significant milestones, including ribbon cuttings, other ceremonies, and conferences sponsored or supported by the U.S. government. Activity managers, contractors, and grantees should update the calendar at least weekly via e-mail. Please check that your event does not coincide with other major local or national events that could affect coverage and attendance at your event. Send e-mail updates to *(local contact information provided here)*. All major public events will be posted on the USAID Serbia-Montenegro website in advance.

2. Request for Official Participation

Requests should be made 10 days before events involving senior State Department or other U.S. government officials.

Please request participation by officials via e-mail to the DOC and CTO no later than the times presented above. The e-mail should contain the purpose of the event, the agenda; the date, time, and location of event; and a list of expected participants, as well as other speakers. Please indicate who will organize and control the event (for example, USAID, implementers, or local government).

3. Press Materials

Have these ready five days before events with high level participation, four days before others events.

Prior to an event, the implementer or CTO should draft a press release and, if necessary, draft press advisories (which precede press releases and invite press) for the event. The press release should answer the following fundamental questions: Who, what, when, why, and where? The press release will have a release date at the top of the page, as well as contact information. You may also want to include a quote from a beneficiary or official in a press release. If the PAO needs to invite media representatives in advance of the event, the DOC will draft a press advisory based on the press release and send it to the PAO, who will issue it and help to follow up and confirm media participation. Those drafting press releases must specify if a press advisory is necessary. If you need a sample press release or advisory, contact the DOC.

The press release should be sent to the DOC via e-mail within the time frame indicated above. The DOC will then review, coordinate with the contractor or grantee regarding any additional information needed, and finalize draft press release. The draft will be sent to the PAO for final approval. The PAO will be responsible for tracking press release edits and coordinating with the DOC on the final release, translating the press release if necessary, disseminating the press release or advisory to all major media outlets, and posting the press release to the Embassy website. The DOC will send the final press release to the implementing partner to be handed out at the event, post the press release on the Mission's website, and send the press release to LPA and the Desk Officer.

Press kits should be prepared for all events with high-level participation. The press kits should contain a press release, a fact sheet on USAID activity, brochures, and contact information in Serbian. The DOC will provide staff with press kits or coordinate with USAID staff and the implementer to produce press kits. USAID implementers often have their own public education staffs that produce press kits.

4. Talking Points and Scenario

Provide talking points and scenario three to five days before the event.
Senior USAID/State Department or other U.S. government officials should receive talking points five days in advance of the event. The DOC will be responsible for working with implementers or CTO to draft talking points. The DOC will format and finalize talking points according to that official's preference. If you have questions about drafting the talking points, please contact the DOC for examples.

When implementers are inviting CTOs to deliver a public address, please check if they need talking points. Often CTOs do not require talking points on the projects they manage.

The proposed scenario will lay out the event step by step, stating who will speak in what order, what will happen (a document signing, ribbon cutting, diploma presentation, etc.), who will do what (for example, who will present the documents in the signing books to the principals), who will interpret, who will be sitting to the side or standing in back of the principals as part of the delegation, and who may take part in the event should questions arise. The scenario should be written out by the event organizers and given to the DOC if USAID is not organizing the event. The DOC will be responsible for disseminating the scenario to relevant officials.

Make sure you have informed the DOC if the event involves a press conference and who is expected to be present.

5. Media Briefings

If one is necessary, a briefing should be put together seven to 10 days before an event.

A media briefing can be a good way to educate the media on a specific topic related to your activities prior to the event. If you are interested in organizing a media briefing, send an e-mail to the DOC requesting assistance in organizing the briefing. The briefing should take place several days prior to event. Media briefings are most effective when the direct beneficiaries of our activities deliver them in conjunction with others.

Communications Strategy Template

A communications strategy is designed to set overall strategic priorities for the USAID Mission in terms of all public outreach activities and events. Ideally, it is designed in coordination with the U.S. Embassy public affairs section and the senior leadership of the Mission to ensure consistency and coordination of U.S. government messages.

KEY ELEMENTS

Objective This is the over-arching imperative that you want to achieve with your communications (in other words, what you are working towards). It is not critical that this be too specific.

> *Example: To increase public awareness of, and support for, USAID's assistance program in Country X.*

Goals Elements that support the over-arching objective and are easily measurable.

> *Examples:*

> *To promote a better understanding of, and support for, USAID goals and achievements.*

> *To communicate reforms and core values supported by USAID programs.*

> *To raise the visibility of USAID as an organization working to address Country X's social priorities, e.g. higher standard of living, more jobs and security, and stronger citizen advocacy.*

> *To generate a positive image of, and support for, USAID activities among the host-country's public and USAID counterparts.*

> *To ensure that visibility and image render political and community support for USAID programs.*

Mission Assessment/Situation Assessment This consists of an honest assessment of the strengths and weaknesses of the Mission's communications efforts to date, as well as what public affairs resources have been devoted to that effort in the past and are available in the future. This assessment will contain information about the effectiveness of previous methods. For instance, if press releases issued by USAID/Embassy get printed word-for-word in a certain publication, the strategy should recognize this. This section might identify the Mission Director as an excellent public speaker to younger audiences— a strength that would be incorporated into the overall strategy. On the other hand, if current communications tools do not include any handout materials

that easily explain USAID activities in country X, the plan should seek to address this weakness.

This section should also assess the degree to which the Embassy supports the USAID communications strategy and how that degree of support will positively or negatively affect the implementation of the plan. In addition, this section should explain how the USAID strategy fits into the overall U.S. government communications effort in the host country.

Media Assessment The strategy must contain an overall local media assessment, including an assessment of independent and state-controlled media. (This is often available from one or more implementers.) DOCs can work closely with the Embassy public affairs section to develop this assessment of print, radio, and television. Included in this section should be information pertaining to audience (for example, is a particular show watched primarily by women?), distribution, and the overall "reach" of various media to the local audience.

In addition, this section would determine whether radio is easier to access than television. If resources are able to be devoted to media placement, the DOC should determine what offers the best market access for the amount spent to reach target an audience. Some Missions may devote the resources to working with a public affairs firm that has access to media placement and reach.

Communications Working Group To ensure universal understanding within the Mission and the Embassy public affairs section, forming a communications working group is highly advised. This could include program staff as well as the Mission Director or a designee. Establishing such a group will help to increase understanding of public affairs and public diplomacy efforts as it relates to the overall work of USAID.

Target Audiences This term refers to audiences that you would like to reach out to, educate, influence, or persuade through your communications. It is important that the strategy segment out audiences because resources are limited and reaching each audience likely requires different tactics. In addition, this section must recognize that USAID's audience is no longer limited to elites and opinion makers, but that broader efforts to reach out to specific audiences, including youth, women, and our program beneficiaries, are a priority.

> *Examples: Host country government, recipients of program assistance (small business loan recipients, for instance), 18- to 35-year-olds, residents of a certain area of the country, business persons.*

Timetable The strategy must contain a reasonable time frame. It is recommended that the maximum length of any communications strategy be limited to one year, since adjustments will likely have to be made from time to time once the effectiveness of the strategy is evaluated.

Tools/Tactics What are the specific activities and tools you will use to reach your targeted audiences? This section will include publications; the website; the Telling Our Story database; media events; public outreach events such as speeches, program launches and events highlighting program successes; media site tours; and press releases. However, it will not be limited to these tools and should address the cultural preferences of the host country. The DOC and the communications working group are in the best position to make this assessment and should consult any information or research that validates the use of certain tools.

> *Example: The Mission will produce a 30-minute radio program targeted to rural areas to educate them about a new agricultural program. Radio has been shown to be the most effective tool in this area, reaching 90 percent of all households.*

Identification of key issues Using the Mission's strategic objectives, this is perhaps the most important section of the communications strategy. Since most audiences cannot absorb more than two or three major themes, it is important for the Mission to prioritize those issues it wants to communicate most effectively during the course of strategy implementation. The Mission Director may have to make the final determination regarding issue priorities; therefore, it is critical that he or she be involved with the drafting of the strategy from the start. Also, keep in mind that USAID-specific issues with regard to humanitarian and development assistance may differ from Embassy messages.

Identification of key messages Once the key issues are identified (for example, transparency, trade, and efforts to increase awareness of HIV/AIDs), key messages must be developed for each issue. Messages must be concise and credible, so they can be repeated and are easily understood. They are developed with the target audience in mind and are not written in technical jargon. These messages must resonate and be workable in the local language.

> *Example: On the issue of trade, messages were identified for the local audience, including the need for access to global markets, job creation, and an increased standard of living. After careful consideration, the following catchy message was created: 'Vender calidad; vivir con calidad ("Sell Quality to Live with Quality").' More than a tag line, this is a message that is concise, easy to understand, and can be easily repeated in speeches and interviews.*

Budget How much are elements of this plan going to cost?

Communications Calendar Once key issues, messages, tools, and budgets have been identified, those elements should be placed into a calendar grid that outlines roughly when announcements, project events, and publications will take place. A calendar will also enable you to make assignments and stick to a schedule.

Monitoring/Evaluation Build into your plan a method for measuring results. This is challenging given limited resources, but you can take fundamental steps. For instance, clip and assess news stories based on their accuracy, placement, and length, and general bias (positive, negative, or neutral). Your evaluation might then take the form of a monthly report on work in progress or periodic briefings for the Mission Director, senior staff, and Embassy counterparts.

More aggressive monitoring and evaluation methods would include, for example, using polling and focus groups to measure host country awareness of outreach efforts related to anti-corruption efforts.

Implementers Build your contractors, grantees, and cooperative agreement partners into the plan since they also conduct outreach activities. Your strategy should also contain a brief overview of the major communications budgets and plans of in-country partners in order to leverage planning and communications with them. This is time consuming but of tremendous value for better understanding overall efforts.

In addition, many Missions have set up a regular working group of implementers to share information and conduct media training for partners.

Sample Scope of Work
for Photographer

SOW: PHOTOGRAPHY SERVICES

The purpose of this purchase order is to procure the services of a photographer to document USAID-financed efforts in Iraq. This purchase order will be a follow-up activity to the photographic assignment carried out by the contractor in May/June of this year. As such, it is intended to photo-document USAID-financed activities begun since that time and their progress. In order to document progress, USAID is particularly interested in images that can be used in before-and-after sequences. Therefore, in addition to documenting new USAID-financed activities, the contractor shall whenever possible revisit locations and provide images that can be used in tandem with images shot during a previous assignment that visibly document progress or improvement of conditions.

In general, these images will be utilized by USAID to generate public awareness of the agency's efforts, document USAID-financed activities and recipients, and create an agency record of the situation in Iraq at the beginning, during, and after the execution of USAID-financed activities. The Cognizant Technical Officer (CTO) and his/her representative shall make specific photographic assignments. Or the photographer may make suggestions concerning assignments to the CTO.

The photographer will use a combination of 35mm color transparency film and digital technology to document the subject matter. The majority of the work shall be in high-resolution digital format with some in 35mm color negatives (a ratio around 1:8). The latter should be in quality suitable for posters, high-resolution publication, and other media. This documentation will combine candid imagery of USAID-financed efforts along with environmental portraits of those people who are direct recipients or beneficiaries of such assistance. All photographs shall include, whenever feasible:

● names and subjects of the people depicted in the image,

● the activities portrayed, as well as the USAID-assistance provided, and

● direct quotes from recipients of USAID assistance.

All of the above material shall be included, to the maximum extent possible, for each image captured.

Upon the completion of this purchase order, the photographer will be responsible for film processing, initial editing of the photographs, and delivery

of the photographs to USAID. The information listed in the above paragraph shall be clearly attached to or associated with each photograph delivered.

Delivery of photographic products during the execution of this purchase order shall be arranged by the CTO. Final delivery of all images and associated materials shall be made to USAID within 20 days upon the last photographic assignment.

The images will remain the sole copyright of the photographer. However, USAID shall receive exclusive rights to all images produced under this purchase order for two weeks from date of delivery. Thereafter, USAID will have unlimited usage rights to all images. Photo credit shall be given, as appropriate to the photographer by name in usual and customary manner, appropriate to the use of the photograph.

The CTO is Joseph A. Fredericks, Director, USAID Public Information, Production and Online Services, e-mail jfredericks@usaid.gov.

BUDGET/DELIVERABLES:

The contractor is authorized to be paid, in advance upon the issuance of this purchase order, the cost of items.

DURATION:

The period of performance is estimated to be from _____ through _____.

SOW created by Joe Fredericks

Sample Scope of Work
for Outreach Campaign

SOW: IMPLEMENTING AGENT

USAID/Indonesia
Scope of Work
Research/Advertising Organization

Introduction:

The U.S. Agency for International Development (USAID) is seeking the services of a communications firm to assist USAID with its public awareness campaign in Indonesia. The firm will assist USAID to design, produce, and monitor a nonconsecutive 30-day intensive media campaign for dissemination throughout Indonesia via print and electronic media. The firm will be responsible for the design, production, and placement of PSAs as well as the pre- and postcampaign research.

The awarded contract type will be an indefinite quantity contract to allow USAID to develop follow-up activities.

Background:

The United States has provided foreign assistance to Indonesia for more than 50 years and given more than $1 billion in assistance over the last 10 years. However, awareness of this assistance is low. Focus groups conducted by Charney Research in May 2005 revealed that the widely reported American tsunami relief effort in Indonesia showed how much an awareness of U.S. aid matters. However, the focus groups indicated that few Indonesians know the scale and result of U.S. assistance to their country and that people are often suspicious of U.S. activity.

Secretary of State Condoleezza Rice has made the showcasing of America's development work a priority foreign policy goal. To support this goal and raise awareness of the impact of USAID activities, the Mission will launch an intensive public-awareness campaign designed to broadly reach Indonesians through newspapers, radio and television in areas where USAID works. Promoting and gaining visibility for USAID's development programs and changing negative attitudes towards foreign assistance will require the development of an intensive media campaign. This initial campaign will be complemented by long-term, follow-up outreach and communications efforts that will continue to support the messages delivered during the campaign.

Objective:

● Increase understanding of, and support for, USAID activities in Indonesia.

● Create awareness about how USAID is benefiting Indonesia (projects and accomplishments) in a personalized (humanized) manner.

● Generate a positive image and increased visibility of USAID and demystify U.S. foreign assistance goals.

● Ensure that visibility and image render political and community support for USAID programs.

The Most Important Image We Want to Convey:

How Americans through USAID are working in partnership with Indonesians to generate prosperity and a better quality of life.

PSA Inclusions:

The PSA should have:

• A USAID/Indonesia website

• The USAID logo and the brand mark

• A sentence stressing that USAID has been working in partnership with Indonesians since 1950

USAID Input:

• Brief about USAID (what USAID is and an historic glance)

• Brief about several USAID projects and their impact

• Success stories

• Branding guidelines

• Samples of a similar PSA campaign conducted by USAID

Deliverables:

The selected firm shall assist USAID in designing and refining details of the public awareness campaign. The firm shall be responsible for managing all subcontracts concerning the campaign, including conducting quality research (specified in attached research SOW), hiring production teams, placing the PSA in print and broadcast media, and producing posters. Specifically, the firm is required to do the following:

1. Conduct pre- and postcampaign research to create a baseline, test assumptions, define messages, and measure impact as specified in the attached research scope of work.

2. Help USAID define the message in Indonesia that will most effectively

inform the Indonesian public of how Americans and the Indonesian people are working in partnership to address Indonesian priorities, e.g., job creation, quality education, improved health and health services.

3. Assist with the graphic design of advertisements, posters, and other print and broadcast materials related to the public awareness campaign.

4. Produce three effective public service announcements for Indonesian radio and television explaining how USAID assistance is addressing Indonesian priorities. These ads should run on all key national TV stations six to eight times a day including during prime time, and on all popular radio stations approximately 15 times a day.

5. Produce a press ad combining all three PSA messages and poster adaptations of PSAs. The ad should print every Friday for the life of the campaign in Kompas or Media Indonesia and Serambi Indonesia (Aceh).

6. Place PSAs and advertisements in print and broadcast media at a favorable rate. Place posters in all regions where USAID works.

7. If necessary, design a follow up campaign including the production of TV and radio spots and newspaper advertisements on other issues not reflected in the initial campaign.

Approvals:

All the tasks required from the selected ad/research firm will be delivered before the start of the public awareness campaign. All deliverables will be assessed by USAID before being published or broadcast in the media.

Requirements:

1. The successful firm will have extensive experience in advertising and conducting market research and marketing campaigns for an Indonesian audience.

2. The successful firm will have substantive knowledge of public opinion trends in Indonesia.

3. The successful firm will have demonstrated the capability to come up with clear messages that resonate with Indonesians and that link USAID activities with Indonesian priorities.

4. The successful firm will have demonstrated the ability to negotiate preferential rates for both production and dissemination of public awareness materials.

5. The principle consultants dealing with USAID must be native Indonesian speakers and speak fluent English.

6. The successful firm will have demonstrated responsiveness to clients.

Selection Criteria:

1. Applicants shall submit and present a portfolio of their previous work in marketing campaigns, television and radio spots, and newspaper advertisements that demonstrates their professionalism and capacity to deliver high quality products.   40%

2. Applicants shall demonstrate their ability to conduct market research. 30%

3. Applicants shall demonstrate their ability to place ads on TV and radio, and in print media at a favorable rate. 20%

4. Applicants shall have a track record of working with international organizations/companies and of being responsive. 10%

Based on a SOW created by Betina Moreira

Sample Job Announcement
for Development Outreach and Communications Officer

SOLICITATION NUMBER: xxx-xxx-xx-xxx
ISSUANCE DATE: xx-xx-xxxx
CLOSING DATE/TIME: xx-xx-xxxx AT 5:00 PM
POSITION TITLE: Development Outreach and Communications Officer
MARKET VALUE: (GS-13 to GS-15)
PERIOD OF PERFORMANCE: Two years with possible extension
PLACE OF PERFORMANCE: Country X
SECURITY ACCESS: Employment Authorization
AREA OF CONSIDERATION: U.S. citizens not resident in Country X

POSITION DESCRIPTION

Introduction

The Development Outreach and Communications (DOC) Officer is located in the Program Office of USAID/X. The DOC reports to the Supervisory Program Officer, but will have extensive interaction with the Mission Director. S/he maintains regular contact and collaborates with the U.S. Embassy Public Affairs Officer (PAO) to ensure that U.S. Embassy personnel, including senior staff, are properly apprised of USAID public activities and projects. S/he also serves as principal liaison with the Agency's Legislative and Public Affairs Bureau (LPA) in Washington, D.C. (USAID/W).

USAID/X manages the U.S. Government (USG) development program in country X with a budget of approximately $100 million. The Mission portfolio includes a broad range of economic growth, democracy, and social-program activities.

The DOC supports USAID/X in the achievement of its objectives by producing and disseminating public information about the Mission's activities for country X and American consumption. The DOC is responsible for collecting, investigating, managing, and distributing information associated with the USAID foreign assistance program in country X. The DOC Specialist serves as the Mission's primary point of contact and liaison for information.

The USAID/X DOC activities are of exceptionally broad scope and complexity. In this capacity, the incumbent is responsible for strategically planning, developing, implementing, and administering the DOC program to promote better awareness and understanding of U.S. foreign assistance to country X. S/he is also responsible for relaying related policies and achievements to key audiences of the host country, in the United States, and throughout other donor countries.

DUTIES AND RESPONSIBILITIES OF THE POSITION

A. Management of the DOC Unit   15%

Responsible for the overall management of the DOC unit including setting priorities for the accomplishment of DOC strategy objectives to ensure that special DOC targets as well as reoccurring DOC demands (e.g., public events) are met; managing the budget for public affairs activities, including travel; overseeing the publication of materials; supervising the maintenance of DOC financial records, DOC materials, and files; taking primary responsibility for Mission's website; and supervising an FSN professional who assists in overall functions of the unit. Requires extensive high-level contacts within the U.S. community in both country X and Washington, D.C. (including with the USAID Director and Deputy Director; the U.S. Ambassador, Deputy Chief of Mission (DCM), and PAO; and USAID/W senior staff), the host country community (such as Ministers, Members of Parliament, and NGOs), and Chiefs of Party of implementing partners.

B. USAID DOC Strategy: 15%

Develops, reviews, and implements USAID's DOC/public relations strategy/plan towards the goals of promoting the Mission's program to external and internal audiences, facilitating information access and sharing within the Mission, and strengthening the Mission's reporting functions. In particular, the strategy should take into account the cost/benefits of particular inputs and outputs in order to optimize communications tools and distribution to the broadest audiences possible. The incumbent counsels the USAID Mission on the selection, targeting, and placement of potential DOC materials in keeping with USAID's country program strategy. Takes into account the need to identify and focus on key sectors that have a natural appeal to local interest as well as USG policies; the importance of ensuring that publicity material used will be noncontroversial; and that the material is visually appealing, well-defined, and contains a human interest element. Responsible for putting in place policies and procedures for Mission communications that clarify roles and responsibilities within the Mission and Embassy and with implementing partners, including templates for various communications tools, standards for creating and finalizing DOC materials, and guidelines for planning and managing events.

C. Media Relations: 15%

1. Responsible for all USAID/X media activities including reporting on country X media, preparing summaries of significant articles and broadcasts, and monitoring media trends that affect the USAID program. Maintains close, frequent professional contact with the highest levels of country X media to fulfill this requirement as well as coordinates with PAO and USAID/W LPA. This may include arranging interviews, briefings, tours of USAID projects; escorting journalists during these events; and keeping records of activities.

2. Keeps abreast of USAID events to ensure that appropriate press coverage is provided. Advises Mission's Front Office and staff if press coverage is not recommended for any culturally sensitive event.

3. Reviews the daily press to keep abreast of coverage that relates to USAID activities. Selects, edits, or summarizes items of interest for the USAID Director, Deputy Director, and USAID staff.

4. Plans, researches, drafts, and/or edits press releases and fact sheets for the USAID Mission in country X. Coordinates with USAID technical offices and with the Embassy's PAO to produce and release timely, accurate, and useful written material for local media and other media.

5. Advises and works with PAO to expand opportunities for coverage of USAID assistance, including TV and radio. Helps USAID technical offices define appropriate candidate activities for coverage, participates in field inspections and final selection, and accompanies TV/radio crews to site locations for filming.

D. Public Events and Activities: **15%**

1. Plans, schedules, publicizes, and carries out activities to present Mission programs to the public, which may include a range of communications tools and distribution to a variety of audiences, with particular field trips to specific events or activities, as well as outreach and media coverage for overall programming.

2. Coordinates field travel and public affairs activities of the Mission Director and Deputy Mission Director, as well as the Ambassador and DCM for USAID events. Prepares schedules and briefings in collaboration with Mission staff and arranges for photo/video and media coverage when appropriate.

3. For USAID site visits or events that involve the Ambassador, DCM, USAID Director, or Deputy Director, ensures that all information related to the events (e.g., backgrounders/scene setters, schedules, talking points, speeches, etc.) has been prepared, meeting quality standards and time requirements.

4. Coordinates signing ceremonies, inaugurations, and/or dedications of USAID projects, including drafting press releases for placement in the country X press and on the USAID homepage, as well as coordinating with appropriate country X and USAID officials on logistics, schedules, guest lists, seating, and other arrangements related to the events.

E. Publicity Material: **20%**

1. Oversees the production of key periodic materials created by the DOC unit, including the quarterly bulletin, more frequent summaries (such as monthly reports), materials for updating the website, and others as deemed necessary.

2. Reviews proposed speeches, video tapes on project activities, brochures, booklets, handouts, signs, and other public relations materials to evaluate quality, propriety in terms of sensitivity to local culture, and accuracy of content. Ensures that all materials meet USAID branding guidance. Recommends revisions, reprinting, or other appropriate action. Works closely with USAID contractors and advises them on the quality of publicity material.

3. Works with USAID technical staff to develop briefing materials for handouts and other special needs. Prepares VIP briefing and press packets for use during USAID site visits or media events. Selects information to be included.

4. Manages the preparation and updating of sub-regional profiles, which must be coordinated with Mission staff. Develops a good database of information on where USAID is working in particular regions of country X, which will be available for site visits and reporting.

F. Editorial Quality Control: **10%**

Acts as editor of official reports, and correspondence produced by the Mission, including the annual report and yearly funding request. Responsible for ensuring that documents meet quality standards.

G. Maintenance of USAID/Country X External Website: **10%**

Responsible for updating (and redesigning as necessary) USAID/X's external website to ensure that its content will have optimal impact in providing information about USAID/X and its programs for a wide range of audiences. Responsibilities include coordinating the selection of information displayed on the website, clearing content, and overseeing placement.

POSITION ELEMENTS

A. Supervision Received: Reports to the American direct-hire Program Office Director.

B. Available Guidelines: USAID general guidelines regarding allowable communications activities and relationships with PAO and the media, including the Graphic Standards Manual; standard Agency procurement and contracting procedures; priorities set by approved strategies; and U.S. Embassy guidelines on public outreach and media relations.

C. Exercise of Judgment: Substantial reliance is placed on the employee's use of judgment concerning priority and effectiveness of public relations documentation and activities. Employee will frequently have to make important decisions out of the office (often out of town) with no facility for consulting with USDH supervisor. Employee must react to and interpret changing priorities and circumstances in country X media and their effects on his/her work in coordination with various mission elements. Many important decisions

will be based on employee's experience and managerial skills. The employee must plan his/her work schedule independently and direct colleagues and subordinates to use skills and abilities effectively.

D. Authority to Make Commitments: Responsible for budget planning and the preparation of procurement requests for publicity materials and related technical services, which will be processed through the USDH supervisor. Receives free reign to discuss political, economic, and social dimensions of the USAID/X program with the country X media representatives, as well as with highest-ranking members of the USAID mission in country X.

E. Nature, Level and Purpose of Contacts:

1. Relationship in the USAID Mission: Ensures that the many diverse elements of USAID and its constituencies play active roles in the development and implementation of USAID's public relations activities, taking a proactive role to ensure that these actions highlight the strong American-country X relationship and emphasize the benefits country X receives from U.S. foreign assistance.

2. Relationship with PAO: Works closely with the U.S. Embassy Public Affairs Section on a range of activities including, but not limited to, public relations strategy development and contacts with the country X media. Ensures that key operational linkages and feedback systems are maintained.

3. Relationship with USAID/W: The Bureau of Legislative and Public Affairs, USAID/W, is an important stakeholder in public relations activities focused on U.S. foreign assistance to country X. Serves as the principal mission contact with LPA and is responsible for coordinating all appropriate actions with LPA's Public Relations Division and in ensuring that all Washington policies related to public relations are followed.

4. Other Relationships: A wide range of other contacts including the U.S. Embassy, involving at times the Office of the Ambassador, Government of country X ministry representatives, U.S. and country X journalists, representatives from the U.S., and other actors. Maintains contact with local reporters, including foreign correspondents, ensuring that they are properly introduced to appropriate individuals at USAID, and sees that their questions are answered when appropriate. The incumbent has close relationships with USAID contractors, indigenous and U.S. NGOs, and other donors.

5. Supervision Exercised: Responsible for the supervision of one FSN PSC DOC Specialist based in country X.

QUALIFICATIONS

Minimum Qualification Requirements

A. Education: A bachelor's degree in journalism, international relations or development, public administration, or a related field is required. A master's degree in one of the above fields is desirable.

B. Prior Work Experience: Seven years of progressively responsible experience in related fields is required, with at least three years experience in public relations and/or journalism. Previous work experience with USG or another international development organization is highly desirable.

C. Knowledge, Skills, and Abilities: i) Demonstrated skills and extensive hands-on experience in public relations are required. ii) A broad understanding of issues related to international development and transition economies is required; experience in the region is highly desirable. iii) The ability to establish and maintain collegial relations with press and media contacts and exercise sound judgment in representing the USG while discussing program activities with the press and media are essential elements of the job. iv) A demonstrated ability to supervise staff and work flows and work as a team member, as well as provide leadership in the areas of his/her competencies, is required. v) The qualified person must possess broad operational planning experience, analytical ability, excellent communication skills, and the capacity to convert planning concepts into firm plans to meet a variety of contingencies. vi) S/he must be comfortable working independently, managing several activities at once, and working under pressure to meet very short deadlines. vii) S/he must have management ability to plan and execute media campaigns and programs.

D. Language Proficiency: Excellent written and oral English communication skills are required. Basic language skills in country X language are an asset.

E. Computer skills: Excellent working use of MS Office, MS Outlook, and MS PowerPoint are required. Basic web design and maintenance is desirable.

SELECTION CRITERIA

Selective/Evaluation Factors

● Demonstrated written/presentation skills, including computer skills (to be tested during interview of selected qualified applicants).

● Demonstrated and relevant oral communication, analytical, organizational and creativity skills.

● Depth and relevance of prior experience with USG or international development organizations designing and implementing communications strategies, with experience (or academic studies) in the region.

● Interpersonal skills and demonstrated ability to supervise staff and work flows and work as team member, as well as to provide leadership in the areas of his/her competencies.

APPLYING

Qualified individuals are requested to submit:

For USPSCs, a U.S. Government Standard Form 171 or Optional Form 612 (available at the USAID website at http://www.usaid.gov/procurement_bus_opp/procurement/forms, http://fillform.gsa.gov, and at Federal offices).

Applications must be received by the closing date and time at the address specified in the cover letter.

To ensure consideration of applications for the intended position, please reference the solicitation number on your application, and as the subject line in any cover letter. The highest ranking applicants may be selected for an interview.

List of Required Forms for PSCS

1. Standard Form 171 or Optional Form 612
2. Contractor Physical Examination (AID Form 1420-62) **
3. Questionnaire for Sensitive Positions (for National Security) (SF-86), or **
4. Questionnaire for Non-Sensitive Positions (SF-85) **
5. Finger Print Card (FD-258) **

Standardized Regulations (Government Civilians Foreign Areas)
*** Forms 2 through 5 shall be completed only upon the advice of the Contracting Officer that an applicant is the successful candidate for the job.*

Contract Information Bulletins (CIBS) Pertaining to PSCS

CIBs contain changes to USAID policy and General Provisions in USAID regulations and contracts. Please refer to http://www.usaid.gov/business/business_opportunities/ to determine which CIBS apply to this contract.

BENEFITS/ALLOWANCES

As a matter of policy, and appropriate, a PSC is normally authorized the following benefits and allowances: (NOTE: An individual defined as a Resident Hire employee may only be eligible for those benefits listed under item A below.)

Benefits:

Employee's FICA Contribution

Contribution toward Health and Life Insurance

Pay Comparability Adjustment

Eligibility for Worker's Compensation

Annual and Sick Leave

Access to Embassy medical facilities, commissary, and pouch mail service

Allowances (If Applicable):

(1) Temporary Lodging Allowance (Section 120)

(2) Living Quarters Allowance (Section 130)

(3) Post Allowance (Section 220)

(4) Supplemental Post Allowance (Section 230)

(5) Post Differential (Chapter 500)

(6) Payments during Evacuation/Authorized Departure (Section 600) and

(7) Danger Pay (Section 650)

(8) Educational Allowance (Section 270)

(9) Separate Maintenance Allowance (Section 260)

(10) Educational Travel (Section 280)

* Standardized Regulations (Government Civilians Foreign Areas)

Federal Taxes

USPSCs are not exempt from payment of federal income taxes.

Based a upon solicitation by USAID/Serbia and Montenegro

10 Golden Guidelines for Good Mission Communications

In every Mission, USAID implements and manages programs to support the host country's people, economy, and/or governance systems. There is much to tell about these partnerships and their successes, and it's up to everyone to play a part in accurately and effectively telling the U.S. assistance story.

A number of best practices created and implemented by DOCs worldwide have proven successful for improving communications. These best practices can help strengthen internal coordination and produce valuable outreach tools. Use what you can and let us know if you have any to add.

1. Strengthen Internal Communications

While it is the DOC's role and responsibility to package and disseminate information about the Mission's programs, this effort requires the assistance of everyone—from the Program Officers to the senior staff. Sharing information regularly and accurately helps the Mission achieve success in telling the story. Some DOCs—and even Washington, D.C. Bureaus—have formed working groups to ensure support for communications strategies and provide a one-stop forum for tackling outreach issues and sharing information.

2. Provide Outreach Training

After a Development Outreach and Communications conference, many DOCs return to the Mission and brief senior staff on best interview practices or prepare a writing session for technical officers. If time is especially tight, Mission staff can benefit from easy-to-understand tip sheets or an outreach operational chart for the Mission. Some DOCs also teach implementing partners skills learned from the DOC conference in order to more consistently tell the story.

3. Create a Monthly Events Calendar

One of the most successful ways to coordinate the activities of the Mission Director and SO teams is to create a monthly event calendar. Mission staff can be involved in updating a shared calendar on any notable upcoming events that would represent USAID and its partner organizations. In many cases, a Mission events calendar can be synchronized with the U.S. Embassy Public Affairs staff for better coordination.

4. Interact Regularly with LPA/W and Bureau Staff

LPA/W and the regional and pillar Bureaus are often asked to present anecdotes from the field or success stories. The Telling Our Story database provides some good examples, but USAID/W is always looking for more. Be sure to copy LPA

and Bureau contacts (including DCHA, EGAT, and GH) on any news items from the Mission or updates on successful practices. It helps to get the message out to international and U.S. audiences, including Congress.

5. Make a Facts Map

Some Missions have produced an easy-to-access internal map that contains updated facts on each project's location and appropriated funds, as well as other pertinent information. This kind of tool allows figures to be coordinated and provides quick answers to some of the most common questions about USAID projects. Work with your technical support team to determine if this is a feasible and effective option.

6. Strategize with Implementing Partners

Many DOCs hold regular meetings with implementing partners to discuss branding and communications issues. Biweekly or monthly meetings can help everyone establish and repeat the same message and coordinate event planning. DOCs can work with the implementing partners to ensure branding requirements are met and that an event is highlighted appropriately.

7. Spread the Word with Newsletters, Press Releases, etc.

Some Mission DOCs produce a monthly newsletter to update Mission staff, USAID/W, and others on what is happening. This tool allows all to understand the big picture and what is happening in other sectors. Targeted press releases to specific media groups and external newsletters for community groups are also strong ways to spread the word on U.S. assistance. *Note:* Production can be time consuming, so allow for that in determining what will provide the most useful payoff in the end.

8. Prep Talking Points

If you have a country issue that crosses development sectors (such as Avian Influenza or a series of partnerships with environmental businesses in Africa), prepare talking points for key Mission actors to use regularly. This helps coordinate messaging. Check with LPA/W if you are seeking talking points for any agency-wide issues. Often, they have talking points that are already prepared and cleared.

9. Think Beyond Media Relations

A number of DOCs foster strong relations with traditional media sources within the host country—like print, radio, and television—and this is important. However, with limited resources it is beneficial to think beyond traditional media. Some of the best practices include e-mail messages, called "shots," or cell phone text messaging. Preparing small, but eye-catching, publications can help

as well; one E&E DOC produced a four-page pamphlet with photos and distributed it to patients at a local hospital.

10. Manage Expectations

In most cases, there is only one communications professional at the USAID Mission to manage a multitude of activities for the Mission Director, the U.S. Embassy, SO teams, USAID/W, and implementing partners. With this in mind, manage your and others' expectations of the DOC role. Set boundaries on tasks and set goals that can be realistically met.

DOC Best Practices Collected: 2004 to 2008

Some development outreach and communications efforts stand out time and again—no matter the USAID Mission or country—as best practices for reaching USAID-specific audiences. These best practices may show immediate and tangible results or they may simply lay a base for understanding U.S. foreign assistance efforts. In a few cases, a best DOC practice may refer to an internal procedure that helps build staff capacity to tell the USAID story, such as an internal memo or newsletter.

Between the years 2004 to 2008, a collection of practices were gathered from USAID Mission DOCs, Mission Directors, program officers, and others from annual surveys, trainings, interviews, and online forums. Of those collected, the below list highlights some of these practices that can be translated to meet your individual Mission needs—to match key issues or special circumstances. There are many activities that meet the criteria for becoming a best practice, including:

1. Has a clear outreach purpose

2. Is considered or proven successful

3. Is useful for replications in other Missions and in other regions

The below provides just a glimpse of USAID best outreach-related practices. Use the lines on following pages to record your Mission's own best practices. Be sure to share your Mission's best practices with your DOC colleagues via the DOC forum (http://communities.usaidallnet.gov/doc).

BEST PHOTO USE:
Traveling Photo Exhibit

Quality photographs of real people and real project work can always be well matched with a clear caption or short story to produce a powerful outreach tool. When USAID/Ukraine chose to highlight 15 years of American partnership with Ukrainians, they conducted a photo exhibit of 42 USAID images that traveled to seven centers around the country, beginning in Kiev. USAID/Macedonia conducted a similar traveling photo exhibit and then produced a 5" x 8" flipbook of the images and stories displayed. This allowed them to repurpose the information into an easy, low-cost handout. If you are interested in conducting a photo exhibit, consider:

1. Ensuring you have quality images that can indeed be reproduced at larger sizes. It is a relatively low cost to reproduce images but the photos should be of 300 dpi or higher to reproduce well.

2. Teaming up with partners or with Embassy PAS colleagues for targeted venue locations—to reach youth, community groups, women or other specific audiences identified—and to inform people about the exhibit.

3. Piggyback on ongoing events such as openings, closings, or milestones of programs.

4. Put the images on the most fool-proof backing possible to avoid minor tears and rips during travels.

5. Provide detailed and appropriately captivating captions that help to tell the story.

BEST FOR EDUCATING THE MEDIA:
Site Visits

USAID Missions in different regions have had success with media tours designed for journalists. At USAID training events, media representatives continue to tell USAID colleagues that they should not just call a journalist and expect them to know the intricacies of development issues. DOCs must educate media *in advance* of a program opening or a crisis.

USAID/Central Asian Republics follow this advice in Kyrgyzstan and take journalists directly to visit with beneficiaries and implementing partners to see firsthand the breadth of USAID partnerships in their country. The media receives a press kit and media tour schedule along with their invitation letter; the Mission gets better-informed media sources that may publish an article upon return or use the information for background in later stories. Media sources can see for themselves the project's involvement and speak with beneficiaries for substance and understanding of the human connection. One DOC in West Bank and Gaza notes that the beneficiaries generally provide quotes that acknowledge the generosity of USAID or understanding that it is U.S. assistance. Tour costs can remain low while the payoff of the activity can be extremely high. In preparing for a media tour, be sure to:

1. Identify a mix of media sources (from television, newspaper, and radio) with a leaning toward how people get their news.

2. Brief Embassy PAS on plans and to set ground rules for who is authorized to speak to the media.

3. Bring Mission technical experts or the Mission Director/Deputy Mission Director on tours.

4. Follow-up on all media inquiries from the trip and touch base with the media after the tour with further information on progress of programs.

5. Monitor for any new mentions from media sources related to development/USAID issues.

NOTE: As a general rule, USAID should not pay for media to attend these site visits, but policy does allow USAID to provide a small lunch or beverage during the tour.

BEST FOR BUILDING RELATIONS:
Partner Inreach

USAID implementing partners have as much desire to tell the story of development as USAID. They can be a valuable resource especially for one-person DOC teams. USAID/Peru's DOC found this to be true as she worked with partners on planning events, responding to media inquiries, approving program materials, and more. In order to manage the Mission activities effectively and bring partners to the table for in-advance planning, she created what she calls her mini-DOC network. Many Missions have trained partners in outreach procedures or worked with partners to address a media inquiry. Pulling teams of partners together for cross-purposing of events and strategic planning of outreach efforts helps the DOC in Peru to leverage resources and gather much-needed logistical support. In all, the DOC and mini-DOC network help to raise awareness of the development activities funded by U.S. dollars. Build your mini-DOC network by:

● Identifying the best partners who can collaborate and participate in attaining the Mission communication strategy goals

● Holding regular meetings (via conference calls or in person)

● Training on media guidance, event planning with principals and Mission Director, and branding and marking requirements as well as the partner practices for strong outreach

BEST FOR SAVING EVERYONE TIME:
Briefing Book Template

The team at USAID/Uganda decided it was time to stop reinventing the wheel for every new CODEL or VIP visit. Now the Mission keeps a database of updated outreach materials that can be used at a moment's notice to Build-Your-Own Briefing Book. The database is available to the entire Mission staff so when one office needs to focus on putting together briefing book for a VIP or Congressional visit, they can pull the cover page, table of contents, activity brief template, success stories, newsletters, and other specific Mission outreach materials directly from the network drive. The pre-existing information can then be more easily customized to fit the specific needs of the visitors.

BEST FOR CAPTURING A CAPTIVE AUDIENCE:
Strategic Placement of Materials

Sometimes the most useful venues for sharing information about U.S. foreign assistance can be in your own building or just down the road. Consider the Consular section of the U.S. Embassy, for example. A vast number of individuals go through the lobbies of Consular offices to obtain visas, passports, and other documents that require a waiting period. Some USAID missions have shown videos, have

publications—like a Mission newsletter or brochures—sitting out on tables, or hang posters in waiting areas to attract visitors' attention. USAID/Yemen applied a low-cost method and created a voice-over PowerPoint to run in the local language in the Consular section. Consider what would work for your cultural environment and repurpose tools that can easily be read or viewed. Just be sure "USAID speak" does not seep into the text; please ensure that the development issues and programs are presented in layman terms.

BEST FOR QUICK MESSAGING:
Fast Fact Cards

Cleared messages and informative facts are always helpful for staff to know in advance of a meeting with counterparts or in circumstances where media may be present. In order to take advantage of opportunities that arise, the USAID/India created fast facts cards, which were laminated cards that would fit in colleagues' pockets easily. On the cards were approved numbers and information about key USAID programs so everyone had the same information at the same time. Missions may wish to place funding amounts or cleared talking points on these cards. Whatever the information, make sure:

● It is useful information for all Mission staff

● All Mission staff carry it to events

● Interacting with media guidance is clear to all Mission staff

● You update the cards regularly to reflect new figures, numbers, or messages

BEST FOR FACE-TO-FACE INTERACTION:
Community-Based Events

When USAID/Jordan's Development Outreach and Communications team planned for how they could best raise awareness of USAID among rural populations and beneficiaries they developed community-based outreach activities. The Mission would host a local community event such as a health-focused day and deliver a small grant to the community, such as a fax machine for a hospital. Representatives from USAID and partners interacted directly with the beneficiaries during the event. These community-based events took place in day care centers, medical centers, universities, and other appropriate locations. Another Mission supported a youth concert to provide information about U.S. foreign assistance to the audience and have this direct interaction. To promote face-to-face interaction with beneficiaries if appropriate in your country, pull together a team composed of your implementing partner(s) and appropriate Mission staff who can provide attendees and help to "market" the event.

GET THE CREATIVE JUICES FLOWING…

It can be difficult at times to sit back and take a breath amidst the emails, piles of papers, and ongoing knocks at the door. But one of the most important tasks for any DOC/communications specialist is to think creatively about how USAID can best raise understanding and awareness amongst its local audiences—while keeping costs relatively low. Brainstorming may feel like a luxury in your position but it is a necessary task in order to strategically put USAID resources to best use.

During DOC trainings in 2008, DOCs, program officers, State Department colleagues, and others were asked to devise creative ways to help USAID outreach efforts. Brainstorm sessions produced some ideas that in the right countries and in the right hands may work well to tell a story that can be remembered.

Here are some of the ideas that came out of these sessions:

1. If USAID produced public service announcements, show them during a break at an open-air movie festival or another fair.

2. Use SMS text messaging more and use GPS to target specific audiences.

3. Conduct a local fashion show and highlight related USAID efforts in business or the like.

4. Provide a USAID screen saver with the website link at all Internet cafes or computer terminals purchased through USAID funds.

5. Hold a photo contest to promote a new website or an international day, like World AIDS Day, for example.

6. Host a soccer/sporting event and announce small grants at the match.

NOTES ON USAID'S BEST OUTREACH PRACTICES

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Sample Mission Order

A Mission may choose to issue a Mission Order designed to ensure that staff understand public outreach procedures, media guidance, or standards for event planning. USAID Mission Orders may be issued to showcase roles and responsibilities of personnel related to their public outreach responsibilities or they may be issued to clarify procedures for inviting an Ambassador to USAID events. A sample is provided below.

USAID Mission/X

Notice No. XXX
DATE

SUBJECT: Public Outreach Procedures and Standards

1. SUMMARY

This Mission Order reflects USAID's specific policies and procedures governing the effective, efficient planning, design, and implementation of public outreach conducted in country X. In particular, this document addresses media opportunities and public outreach efforts reflecting a policy that moves from risk avoidance to one where speaking out and engaging with the media is encouraged. However, the directive to educate the public on foreign assistance activities does not authorize the discussion of U.S. policy issues with the media.

The Director and Deputy Director are the only Mission personnel who may comment on behalf of the U.S. Agency for International Development as it relates to U.S. policies, future direction, political reasons behind decisions, and topics that can be controversial in nature. The Director and Deputy Director may, at their discretion, permanently or temporarily appoint others to speak on specific topics of concern, but appointments of this kind will be the exception to the rule.

This guidance is provided—in part—to address the concerns associated with a more proactive stance of USAID/X Mission staff with the public and the media. It also outlines the proper coordination with the USAID outreach unit (known as the Development Outreach and Communications team) to increase awareness of USAID programs and the impact they have on the lives of country X citizens.

2. DOCS

Development Outreach and Communications specialists (DOCs) develop strategy and coordinate the dissemination of USAID information. The DOC is responsible for the Mission communications strategy and liaises directly with technical officers, implementing partners, USAID/W, and the U.S. Embassy's Public Affairs Section to ensure consistency in public communication.

DOCs should maintain close contact with the Mission and USAlD/Washington Bureau for Legislative and Public Affairs (LPA) to coordinate official guidance and talking points.

3. COORDINATION

The DOC staff coordinates all public affairs activities, such as interviews, press conferences, VIP visits, ceremonies and other events, and release of information to the media or the public. This function includes reviewing and editing written materials (speeches, handouts, briefing memos, talking points and briefing book materials, etc.) whether media is expected to attend or not.

In order to ensure consistency of messaging, and compliance with the Foreign Assistance Act of 1961 and other guidance related to the dissemination of public information, coordination with the DOC office prior to any planned community event, speaking engagement, media release, or scheduled interview is required.

All written materials for public events and visits (scene setters, request for attendance, decision memorandum, brochures, etc.) must be cleared by the DOC staff before going to the Front Office. The DOC team coordinates with USAID-funded contractors, cognizant technical offices, the Front Office, the Ambassador's Office, and the Embassy Office of Public Affairs (PAS), as needed, to maximize the limited resources available to reach new and wider audiences.

DOC staff is responsible for coordinating the clearance of printed materials and distribution of draft press releases for USAID activities. The revised draft will be reviewed by the appropriate technical offices and reviewed with Embassy PAS.

On media: All local and foreign media requests to USAID staff for information and/or interviews must first be cleared by USAID/X DOC staff, which will coordinate these requests as appropriate and facilitate arrangements for interviews or release of information.

A DOC representative shall be present at all interviews. If they can not be present, such as at an unplanned interview during an event, the interviewee shall inform the DOC staff of the name of the publication and journalist, contact information, and the substance of the interview as soon as possible. Keep in mind that a request for

an interview is not an obligation. There are times and conditions when it would be appropriate to decline or (re)schedule the interview for another time.

All staff must restrict their comments to those within their areas of technical expertise and may include: program goals, pre-approved USAID policy statements, host nation partnerships, specific budgets, developments in aid programs, involvement in and experiences related to projects, etc. Authorization by the Front Office to speak on broader topics is by exception and is at the discretion of the Mission Director.

Clearance beyond that obtained by the Mission DOC staff is not needed to speak on the record to any local media, print or television journalist provided your comments stay within your area of expertise. Further clearance is required to speak to non-host country media.

All requests related to foreign policy and bilateral relations must be referred to the U.S. Embassy. Mission personnel shall not attempt to comment on these issues. Mission DOCS shall only respond to requests for information regarding USAID's development projects and activities, and humanitarian assistance.

4. DISSEMINATION OF INFORMATION

USAID DOCs disseminate messages and story ideas to the public and news media by a variety of spoken and printed means. Selecting which outreach method(s) to use is based upon many factors. Proper application is essential to ensure proper reporting and effective use of resources.

Some of the methods available to the DOC team may include: news releases, news advisories, news conferences, media availabilities, site visits, educational tours and events, brochures, editorial boards, interviews, background briefings, responses to queries, USAID beneficiary opportunities, speeches, websites, and the release of visual information, including photographs and video footage.

Regardless of the form in which information is disseminated, several principles apply in regard to the release of information:

A) Information must be timely and accurate.

B) Information must be clearly written, in plain, simple, understandable language.

C) Information is subjected to content and policy review prior to release.

D) The appropriate releasing authority is based on:

- the subject matters proposed for release

- the reach of the news medium in question (local, national, regional, etc.)

- the prominence of the speaking platform

- the anticipated audience

- political sensitivities

E) Information must support USAID/State strategic plans.

F) Official information intended for commercial use must be cleared by LPA.

According to the U.S. Advisory Commission on Public Diplomacy 2004 report, the success of the objectives listed in the USAID-State strategy "depends on international public support," which is obtained through a more assertive, yet coordinated, outreach effort.

5. MEDIA ATTRIBUTION

The phrases discussed below are occasionally misunderstood by USAID staff and by reporters themselves. Before news conferences, interviews, or any other news media encounter, DOCs will establish ground rules for interaction. At a minimum, these will include the means of attribution and agreement on the timing and conditions of the media encounter. Unless there are compelling and overriding reasons, it is usually best to keep all exchanges with news media "on the record" to avoid any confusion. The approvals for an interview and the arrangements and conditions of a media encounter are coordinated by the outreach staff.

● **On the Record.** Remarks can be quoted verbatim and attributed directly to the identified information source or as agreed upon with the reporter. *Note:* "On the record" is the normal condition for encounters with news media. Therefore, say what is within your technical experiences, and say it with the understanding that others will know you were the one to say it.

It is essential that all public speeches, regardless of the expected audience, be submitted to the DOC staff to for review by Embassy PAS, since it a not unusual for a reporter to ask for a speaker's name and title to provide attribution to a quote presented during a speech.

If you are uncomfortable with what you wish to say, don't say it. If controversial or sensitive information needs to be disseminated, there is an official spokesperson at some level in the organization who has the responsibility to provide that information. Defer to them.

The following terms describe conditions for an encounter with news media that are deviations to this standard policy. They are to be used only on rare occasions, with the concurrence of the Director and when a DOC is present who is skilled and experienced in their use. For many reasons, including differing professional ethics among reporters and the possibility of being misunderstood, DOCs have no assurance that the terms of these conditions will be met. The following classifications do

not authorize privileged communications between Mission personnel and members of the news media when discussing official or sensitive information.

● **Background.** Material offered to a reporter with the understanding there will be no attribution to a specific source. A person may be identified as "a government source" or "a USAID official." Public Domain information obtained from the internet or provided by fact sheets, press releases, biographies, etc, may be used with or without mention of the source. If the reporter agrees to receive information on background, the information can be used as if it originated with, or was common knowledge of, the reporter.

● **Off the Record.** The condition for a news media encounter to be "off the record" must be used only with great care. The phrase cannot be relied upon as a means of "retrieving" an inadvertent slip of the tongue; it may or may not be effective. Reporters do not consider themselves under obligation to place information off the record "after the fact."

● **Official Spokesperson.** When someone is authorized to speak for officials of the Agency with the proper authority on a particular subject, topic, or at an event to express the official position, the person is considered to be an official spokesperson for purposes of USAID information. "The USAID's spokesperson is authorized to speak on behalf of USAID and all USAID topics," as referenced in AIDAR 752.7035, Public Notices.

Official spokespersons have the duty to present the official position and therefore will not conduct 'personal opinion' interviews.

● **Official Statement/Unofficial Statement.** The distinction between an official and unofficial statement is vague at best, and both technical officers and outreach personnel must understand that any public statement made by USAID personnel can be construed as an official statement by the public or the news media. Official information, regardless of how it is presented to the public or media, is to be processed in accordance with public information guidelines prior to its release. Persons making official statements shall refrain from comment on matters outside their purview and shall avoid speculation. USAID personnel who, while not working, make "unofficial" or "personal" comments or consent to be interviewed by news media representatives, must limit comment to personal experiences and avoid comments related to U.S. policy.

● **Official Document.** Written documents provided to the media may also be cited in addition to, or in place of, an official spokesperson. The document most commonly disseminated to the media by USAID/X is the Fact Sheet. They may be generated based on geographic area, strategic objective, project, activities, funding, message, etc. Fact sheets may be hand delivered or transmitted to the media. Ad-

ditional documents often provided to the media are the Media Advisory and Press Release. These documents, normally drafted by the technical offices and cleared through the public outreach process, may be attributed to the document itself, USAID/X generically, or by reference to "information provided by the Development Outreach and Communications unit."

6. POLICY REGARDING PAYMENT TO JOURNALISTS

It is USAID policy that U.S. government funds shall not be used to make payments to print or broadcast journalists for writing articles or conducting interviews as an incentive for media news coverage. USAID/X does not deem it a reasonable use of USAlD funds to make such payments to journalists for work which they already receive compensation from an employer. The primary incentive for a journalist to report a story should not be an additional financial payment, but should be that the story is newsworthy and therefore is appropriate for reporting.

In specific cases where USAlD/X encourages or sponsors public or media information and awareness events or opportunities "directed at expanding and strengthening host country awareness of the importance, impact, and breadth of U.S. assistance" as described in a memo dated March 22, 2005, from Jan Miller GC/LP to Joe Fredericks, LPA/PIPOS, the USAlD/X DOC staff will coordinate such events and determine, in consultation with the procurement office, on a case-by-case basis what costs are reasonable for payment by USAID, either directly or through contractors or grantees, including costs for sponsoring journalist travel and per diem. Travel and per diem payments, when approved, are provided to cover costs that are unlikely to be incurred in the performance of the reporter's normal duties due to increased time requirements and/or the geographic location of the event or opportunity.

Financial incentives for reporters are to be avoided. Incentives shall not to be confused with the authorized use of funds for the creation of paid advertisements or the placement of messages and/or advertisement products, whether in the print media, radio, broadcast, film, outdoor media, direct mail or other advertising venues as expressed in the Foreign Assistance Act of 1961, Section 641 as amended Public Law 87-195, and the U.S. Advisory Commission on Public Diplomacy 2004 report.

7. BRANDING

The objective of the Agency's unified branding effort is "to enhance the visibility and value of U.S. foreign assistance; better link communications to U.S. foreign policy, national security, and the American people; and improve the impact and consistency of communications across bureaus, sectors, missions, and programs."

All materials released by the Agency or financed by the Agency must comply with the Agency's Branding and Marking policies. Branding requirements are detailed in ADS 320 and the USAlD *Graphic Standards Manual* available online at www.usaid.

gov/branding. Additional guidance can be gained from 22 C.F.R. Part 226, Administration of Assistance Awards to U.S. Non-Governmental Organizations; Marking Requirements.

8. CLARIFICATION

Questions concerning this public outreach guidance should be directed to the DOC team in the X (Front or Program) office.

<div align="right">

Signature of Mission Director
Or Approving Authority

</div>

DRAFT PERFORMANCE MONITORING PLAN
Development Outreach and Communications

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
Communication/Outreach Objective: Increased awareness and/or knowledge of US foreign assistance/USAID activities in Country X					
Result: A USAID Mission which promotes communication and outreach					
USAID/Mission Communications Strategy is completed and updated annually	A USAID Mission communications strategy written and approved by USAID (and the Embassy) which properly identifies messages, tactics and audiences. Strategy is also reviewed by USAID/LPA. Unit: NA	USAID Communications Strategy	Review strategy status at beginning of fiscal or calendar year	Annually, at beginning of fiscal or calendar year. None to Low	DOC
Degree to which USAID Communications Strategy is implemented by USAID and implementing partners	The degree to which the strategy is being followed in terms of audience outreach, budget, messages, tools, etc. as defined in the strategy by both USAID and partners which have been identified in the strategy. Unit: NA For consideration: On	Milestone chart listing all tasks and indicating whether they were completed or not	Assign weights to task (example: 5 points for very important) in completion of milestone chart	Quarterly, at end of quarter. None to Low	DOC

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	a scale of 1 to 5 with 5 being the highest rating or very well implemented, somewhat implemented, etc.				
Amount of time USAID commits to communication and outreach activities	Percentage of time per month that Mission devotes; most Missions now employ a full-time DOC Unit: percentage	Mission Director monthly calendar USAID monthly calendar	Monthly analysis	Monthly; at beginning of subsequent month None to Low	DOC
Degree to which USAID DOC is fully integrated into senior USAID management team (Note: Is this data collection useful? For what purpose?)	Analysis concerning DOC's role in senior management decisions concerning communications and setting overall direction for Mission; also does DOC report to MD and/or sit in on senior team meetings? Unit: could be measured on a scale of very, somewhat, not very, not at all	Job description coupled with selective interviews	Analysis of job description coupled with selective interviews which measure integration of DOC into team, including 1) does DOC sit in on senior team meetings 2) does DOC provide overall policy guidance on communications, etc.	Quarterly or Annual None to Low	
Degree to which different program offices regularly provide requested information for outreach events and	Analysis concerning program office contributions to communication process, including	Quantitative or qualitative review of information provided; could disaggregate by communication tool as	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
materials — * Note: DOC should clearly define what information requests are made (data, program details, etc.)	information for fact sheets, website, events, social media Unit: could be measured on scale of very often, somewhat often, not very often, never Unit: Could be measured on a scale of very often, somewhat often, not very often, never	definition indicates			
Degree to which program staff participate in communications and outreach events and activities	Analysis of the degree to which selected USAID staff participate in outreach events Participation can be defined as a speaking role; technical brief; site visit or speaking on the record to the media Events include speeches, ribbon cuttings, CODELs, site visits, etc.	Annual tabulation of events and staff participation or random sample of events; could be done in collaboration with program offices	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	Unit: Could be measured on a scale of very often, somewhat often, not very often, never				
Degree to which USAID Mission Director and/or Deputy Mission Director participate in outreach events	Analysis:: Same as above Unit: Same as above	Annual tabulation similar to above	Analysis of data for each office done at the end of the fiscal or calendar year	Annually None to Low	
Degree to which specific development and foreign assistance messaging is incorporated into USG events/remarks/products in country	Analysis of the degree to which US foreign assistance messaging is incorporated into overall USG events Unit: Could be measured on a scale of very often, somewhat often, not very often, never	Specific review of speeches, fact sheets, website, social media messaging, etc.	Monthly analysis	Monthly	
Result 2: Increased citizen awareness/expanded citizen knowledge of USAID activities					
Amount of USAID issued press releases which are printed in targeted publications	The extent to which USAID issued press releases are printed in whole or in part, or result in a subsequent news story, in the targeted publications Will also need to define whether implementer-	Quantitative and qualitative review of targeted newspapers and publications, disaggregated by newspaper, magazine, and Internet, etc.	At the end of every month, a full review of publications, for instance, would occur with a full list of USAID press releases issued by date and topic Implementers could also track and provide	Weekly or Monthly Low to Medium	Please note if USAID is not permitted to issue releases and/or if they are only issued through the U.S. Embassy

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	issued news releases which mention USAID are included in tabulation Disaggregated by media type (radio, newspaper, magazine, tv, website) Unit: percent as measured by total number issued per total placed by media outlet		information to USAID Analysis may include not only numerical count/percentage increases but also accuracy, etc.		
Percent of target audience with increased awareness of USAID or USAID activity from news coverage generated by press releases * Note: Should probably only measure USAID awareness since respondent could be aware of activity but not the fact that it is funded or implemented by USAID or USAID implementing partner	The extent to which the targeted audience has increased awareness of the USAID activity or program; the target audience is defined in the communications strategy Unit: percent	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Initial baseline survey to be followed by polling at set time of implementation of strategy (for instance: after implementation of paid media campaign)	Two times/year Medium to high	
Amount of USAID fact sheets distributed to	Total number of USAID-issued fact	Quantitative summary of fact sheets by topic	Quarterly review of fact sheet inventory at	Quarterly	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
target audiences	sheets (could also include implementer issued) disaggregated by topic and/or target audience Unit: Numerical with percentage comparison to previous quarter	and/or target audience	end of quarter	None to Low	
Percent of target audience with increased awareness of USAID or USAID activity from distribution and "consumption" of fact sheets	The extent to which USAID-issued fact sheets increase awareness of target audiences defined in communications strategy Unit: percent	Survey data from random sample survey at locations Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Short survey of random sample of citizens at key locations where fact sheets are distributed on at least 2 selected days of the quarter Polling and/or focus group question on sources of information about USAID and increased awareness	Quarterly Low to Medium Medium to High	DOC or implementing partner
Amount of USAID news events/news conferences conducted	Total number of USAID organized news conference Could also include news conferences conducted by Embassy in which key USAID initiative is the focus; and/or implementer-	Quantitative summary of news conferences; could disaggregate by topic	Quarterly review, at end of each quarter, of total	Quarterly None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
	organized events Unit: Numerical with percentage comparison to previous quarter				
Percentage of target audience with increased awareness of USAID or USAID activity from news events/news conferences	The extent to which USAID news conferences increase awareness of target audiences defined in communications strategy Unit: percentage	USAID-issued survey Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Short survey to randomly selected participants or exit evaluation at news conference Polling and/or focus groups question on sources of information about USAID	Quarterly, at end of each quarter None to Low Medium to High	
Amount of USAID produced radio spots produced and aired	Total number of USAID-produced radio shows or PSAs Unit: Numerical with percentage comparison to previous quarter	Quantitative summary of radio shows by topic and/or target audience	Quarterly review at end of each quarter of radio spot inventory	Quarterly None to Low	
Percentage of target audience with increased awareness of USAID or USAID activity from radio spot	The extent to which USAID-issued radio spots increase awareness of target audiences defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Polling and/or focus group question on sources of information about USAID and increased awareness	Two times/year Medium to High	
Amount of USAID television ads or PSAs which are developed	Total number of USAID-funded/produced	Quantitative summary of TV ads or PSAs by topic and/or target	Quarterly review at the end of each quarter of ad or PSA	Quarterly None to Low	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
and/or aired	television ads or PSAs aired Unit: Numerical with percentage comparison to previous quarter	audience	inventory		
Percentage of target audience with increased awareness of USAID activities from television ad or PSA	The extent to which USAID-issued TV ads or PSAs increase awareness of target audiences as defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Same as above	Two times/year Medium to High	
Amount of USAID produced newspaper advertisements or inserts which are developed and/or printed	Total number of USAID-newspaper ads Unit: Numerical with percentage comparison to previous quarter	Quantitative summary of newspaper ads; could disaggregate by topic	Quarterly review at the end of each quarter of newspaper ad inventory	Quarterly None to Low	
Percentage of target audience with increased awareness of USAID or USAID activity from newspaper advertisement or insert	The extent to which USAID-issued newspaper ads increase awareness of target audiences defined in communications strategy	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Same as above	Two times/year Medium to High	
Increase in # of YouTube followers	Total # of YouTube followers on USAID/Mission created YouTube site	Quantitative summary	Account review	Monthly	
Increase in # of Twitter	Total # of Twitter	Quantitative summary	Same as above	Monthly	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
followers	followers on USAID/Mission created Twitter account				
Increase in # of Facebook fans	Total # of Facebook fans on USAID/Mission created Facebook page	Quantitative summary	Same as above	Monthly	
Result 3: Increased institutional and financial support					
Percentage of overall Mission budget devoted to USAID outreach and communications activities *Note: What is ideal percentage – does Agency have a target amount for Missions?*	Annual budget devoted to USAID communications and outreach activities, products and initiatives; could also include program funds which are devoted to outreach activities Unit: Percentage as part of overall USAID Mission budget or percentage as compared to previous fiscal year	Annual budget or specific communications budget	Annual review, at beginning of fiscal year	Annual None to Low	
Extent to which communication funding has increased over set time period	Determination by yearly review which tracks funding increases, not solely limited to salaries Unit: Overall $$ amount compared to previous fiscal year	Annual budget or specific communications budget	Annual review, at beginning of fiscal year comparing to previous year/s	Annual None to Low	

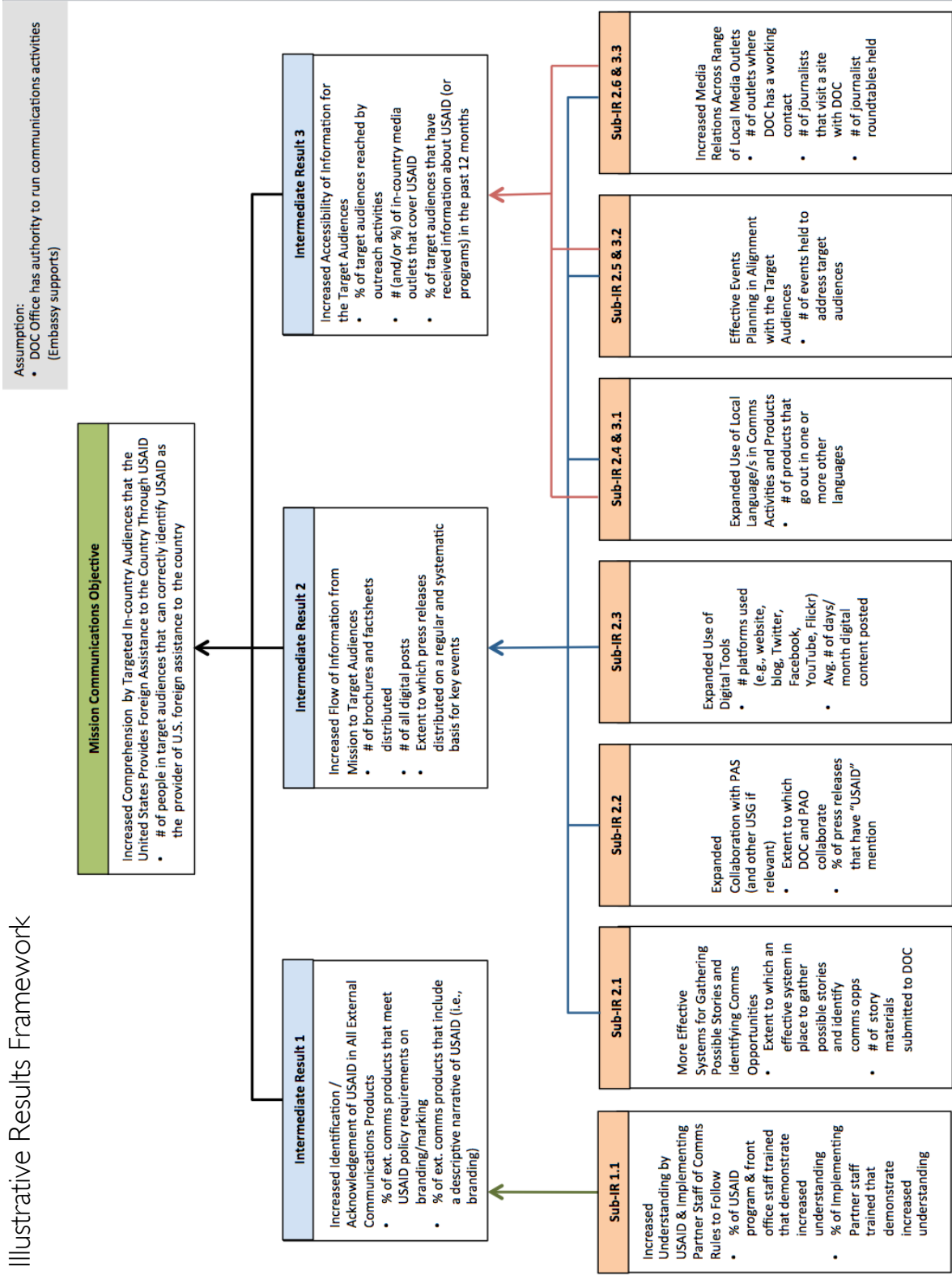| Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
Result 4: Enhanced flow of information to target audiences regarding US foreign assistance					
Extent to which regular (define) updates of USAID website occur	Extent to which updated information on USAID activities and programs is regularly provided through website Unit: Regular updates as defined by DOC occur	Develop and review of quarterly status report which would track uploading of new information; could disaggregate by topic, etc.	At end the end of each quarter, review status report	Quarterly None to Low	
Percentage of target audience which receives information from USAID website	The extent to which USAID website increases awareness of target audiences defined in communications strategy Unit: percent	Public opinion polling and/or focus groups which contains detailed questions about sources of information of respondents	Initial baseline survey to be followed by polling at set time of implementation of strategy	Two times/year Medium to High	
Extent to which new outreach, media and social media products are developed and distributed by USAID * Note: Must define products — webcasts, podcasts, blog entries, for instance	Extent to which new outreach products which have not previously been used and developed by USAID are developed Unit: Yes — would mean that new products have been developed	Quarterly or annual summary, disaggregated by product type	Summary of new outreach products developed at end of each quarter or fiscal or calendar year (social media tools, etc.)	Quarterly Medium to High	
Regular information provided to portals,	Degree to which regular and timely	Quarterly or annual summary,	Summary at end of quarter or	Quarterly or Annually	

Performance Indicator	Definition and unit of measure	Data source	Method of data collection	Frequency/schedule of collection and overall cost	Responsibility for data collection
blogs and other communication mediums	information is provided to (and potentially posted) portals and blogs	disaggregated by topic	fiscal/calendar year	None to Low	
Frequency of USAID Mission specific mentions on USAID Impact Blog, Frontlines, USAID website, etc.	Extent to which updated information on Mission specific activities and programs is published on/in any of the following: USAID Impact Blog Frontlines USAID website	Publications, etc.	Quarterly review of publications, website	Quarterly	

Developed: March 2008 by Ellen M. Yount, Consultant/MSI
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Illustrative Results Framework

Assumption:
- DOC Office has authority to run communications activities (Embassy supports)

Mission Communications Objective

Increased Comprehension by Targeted In-country Audiences that the United States Provides Foreign Assistance to the Country Through USAID
- # of people in target audiences that can correctly identify USAID as the provider of U.S. foreign assistance to the country

Intermediate Result 1

Increased Identification / Acknowledgement of USAID in All External Communications Products
- % of ext. comms products that meet USAID policy requirements on branding/marking
- % of ext. comms products that include a descriptive narrative of USAID (i.e., branding)

Intermediate Result 2

Increased Flow of Information from Mission to Target Audiences
- # of brochures and factsheets distributed
- # of all digital posts
- Extent to which press releases distributed on a regular and systematic basis for key events

Intermediate Result 3

Increased Accessibility of Information for the Target Audiences
- % of target audiences reached by outreach activities
- # (and/or %) of in-country media outlets that cover USAID
- % of target audiences that have received information about USAID (or programs) in the past 12 months

Sub-IR 1.1

Increased Understanding by USAID & Implementing Partner Staff of Comms Rules to Follow
- % of USAID program & front office staff trained that demonstrate increased understanding
- % of Implementing Partner staff trained that demonstrate increased understanding

Sub-IR 2.1

More Effective Systems for Gathering Possible Stories and Identifying Comms Opportunities
- Extent to which an effective system in place to gather possible stories and identify comms opps
- # of story materials submitted to DOC

Sub-IR 2.2

Expanded Collaboration with PAS (and other USG if relevant)
- Extent to which DOC and PAO collaborate
- % of press releases that have "USAID" mention

Sub-IR 2.3

Expanded Use of Digital Tools
- # platforms used (e.g., website, blog, Twitter, Facebook, YouTube, Flickr)
- Avg. # of days/month digital content posted

Sub-IR 2.4 & 3.1

Expanded Use of Local Language/s in Comms Activities and Products
- # of products that go out in one or more other languages

Sub-IR 2.5 & 3.2

Effective Events Planning in Alignment with the Target Audiences
- # of events held to address target audiences

Sub-IR 2.6 & 3.3

Increased Media Relations Across Range of Local Media Outlets
- # of outlets where DOC has a working contact
- # of journalists that visit a site with DOC
- # of journalist roundtables held

Contact Information

If you would like additional information about the Development Outreach and Communications program, please contact the Bureau for Legislative and Public Affairs. In addition, information and updated contact information can be found on the USAID intranet: http://inside.usaid.gov/LPA/survival_manual.