Effective Communication for Environmental Conservation

A manual for and by environmental communicators in the Red Sea & Gulf of Aden region

Trainer Edition
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**PERSGA** - The Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden is an intergovernmental authority dedicated to the conservation of the coastal and marine environments in the region and the wise and sustainable use of their natural resources.

The Regional Convention for the Conservation of the Red Sea and Gulf of Aden Environment (Jeddah Convention) 1982 provides the legal foundation for PERSGA. The Secretariat of the Organization was formally established in Jeddah following the Cairo Declaration of September 1995. The PERSGA member states are Djibouti, Egypt, Jordan, Saudi Arabia, Somalia, Sudan, and Yemen.

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**IUCN – The World Conservation Union**

Founded in 1948, IUCN – The World Conservation Union brings together States, government agencies and a diverse range of non-governmental organizations in a unique world partnership: over 980 members in all, spread across some 140 countries.

A central secretariat (Headquarters Gland, Switzerland) coordinates the IUCN Programme and serves the Union membership. Through its six Commissions, IUCN draws together over 10,000 expert volunteers in project teams and action groups.

**IUCN Commission on Education and Communication – CEC**

The Commission on Education and Communication is one of IUCN's six Commissions. CEC is a global network of voluntary, active and professional experts in environmental communication and education, who work in NGO, mass media, government and international organizations, professional networks and academic institutions.

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Word of Welcome

Welcome to the first training manual for and by environmental communicators in the Red Sea and Gulf of Aden. This manual is an initiative of PERSGA – The Organisation for the Conservation of the Environment for the Red Sea and the Gulf of Aden, in cooperation with the Commission for Education and Communication of the IUCN - The World Conservation Union. PERSGA aims to develop a regional framework for the protection of the environment and the sustainable development of coastal and marine resources by implementing the Strategic Action Programme (SAP). An important component of this programme is the enhancement of Public Awareness and Participation (PAP). The two immediate objectives of the PAP component are (1) enhancement of public awareness of the importance of coastal and marine resources in the region, and (2) promoting an active role of the public in their conservation. To achieve these objectives, and to assure sustainability of the component’s activities beyond the duration of the project, highest priority is being given to institutional strengthening and capacity building. Therefore, this special training manual “Effective Communication for Biodiversity Conservation; a toolkit for communicators in the Red Sea region” has been produced.

The purpose of the manual is to improve the capacity of environmentalists, NGO’s and individuals in the region to deliver effective environmental communication and public awareness programs to local communities, decision-makers, and other stakeholders that will support conservation activities in the region. The training will define and provide knowledge and skills about how public awareness programs can contribute towards marine environmental management and sustainable development.

How was it produced?

PERSGA aims to stimulate active participation of the countries in the region. In that light, this manual has been prepared both for and by a Regional working Group of representatives from those countries. With IUCN guidance, this Regional working group developed the manual in a series of workshops and feedback sessions, in which the manual was tested for regional and national relevance and effectiveness. Special care was taken to give ample attention to case studies and experiences from the region. The result of this unique joint, regional effort now lies in front of you, ready to use.

Instructions how to use it

This manual is not a book that is printed in a final version. It is a dynamic, evolving set of modules that can be adapted, revised, added to or taken out from, according to the specific needs of the occasion. When targeting NGO representatives you will need different inputs than when dealing with Government employees. With time and experience gained, you might like to add case studies or lesson’s learned. Each module consists of a short introduction, an outline of methodology to be used, followed by a set of training materials that can be selected from.

Trainee Booklet

There is a trainee booklet with this manual, that could be distributed at the end of the workshop.
# Effective Communication for Environmental Conservation

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Module 1:
Introduction to the manual
Module 1: Introduction to the Manual

I. Objectives

After this first module, the participants will

- have clear expectations of the concept, working method and objectives of the training workshop.
- have established more personal relationships between each other and the facilitators
- have been exposed to interactive procedures of learning by doing
- understand that presentations is one of the pillars of this week
- have brainstormed on the concept of communication
- have brainstormed on the concept of education and positioned education vis a vis communication
- have first understanding that effective communication is about people, establishing relationships, about getting under the skin of the so called receiver of communication.

II. Programme

1. Welcome, why this workshop?
2. Introductions
3. Expectations
4. Objectives of the workshop
5. Structure of the course
6. Outline manual

III. Working methodology

1. Welcome. Why this workshop?

Duration: 10 mins
Role of other facilitators: pin cards
Procedure:
- Visualised presentation: prepared cards with large letters printed, key words only:
  - PERSGA
  - PAP Component -history
  - People's participation
  - Survey needs
  - Role IUCN -CEC: advocacy/ capacity/ service IUCN members
  - Participating organisations

2. Introductions

Duration: 30 mins
Role of other facilitators: distribute, collect and pin cards
Procedure:
- Explain purpose: to work together we need to get to know a little about each other. Let's pretend we have never met before. What do you want to tell the group about yourself?
- Hand out pens and small cards in 3 different colours. Print name on yellow, country on red card.
- Print a word on a blue card starting with the same letter as your first name that symbolizes the main meaning of communication for you in your work. Collect cards and pin to a board/ sheet.
- Let each person explain the meaning of his/her word. Informal group discussion to learn more about each others work and background, based on participant information sheets.
3. Expectations

**Duration:** 30 mins  
**Role of other facilitators:** prepare sheets; distribute, collect and pin cards  
**Procedure:**
- Explain purpose: at the end of the workshop, we want to assess whether your needs have been met. Therefore we need to know what you are expecting to gain and take back with you, and what obstacles you fear in achieving this - we will use these in our evaluation.
- First talk about your expectations and fears with your neighbour, for 3 mins. (In the mean time, pin a large sheet with 'expectations' and one with 'fears' to the top of the sheet to the front board)
- Per pair, write 1 or 2 expectations on blue cards and your fears about this course or being here, on green cards.
- The cards are clustered, as the participants go around in turn to express their expectations and fears.
- These expectations will be added to the objectives sheet (next exercise) and used to evaluate the course. Discussion: Are we more or less expecting the same results? outcomes?

4. Objectives of the course

**Duration:** 20 mins  
**Role of other facilitators:** distribute, collect and pin cards  
**Procedure:**
- Explain purpose: to be able to measure at the end whether we have achieved our objectives
- Keep the expectations sheets in sight
- Have cards ready with key words (to be agreed by trainers)
- Use a plenary brainstorm to list objectives on a flipchart
- Cluster them and derive main objectives

5. Structure of the workshop

**Duration:** 20 min  
**Role of other facilitators:** prepare scheme  
**Procedure:**
- Explain purpose: this is a learning workshop in a flexible, learning-by-doing format
- The programme will also be in a flexible format to demonstrate that the participants can recommend changes, and adjustments can be made on the board during the course of the training. This will be done during the evaluations at the end of each day. to be able to measure at the end whether we have achieved our objectives
- The proposed programme will be built up in a framework and kept on the wall. Days, module titles and presentation times will be in place on coloured cards.
- Presentation schemes: learning by doing: improving personal effectiveness along the way
- Daily evaluating schedules: is our approach effective and efficient? Is it feasible or too ambitious? How should we improve?
- Outline manual: Give an overview of the contents of the manual and link it to the programme of the workshop: what are we going to do, and when?
IV. Support Materials

For this module, one will need coloured cards, markers, a flipchart and an overhead projector or beamer. **Attached to the module, one will find:**

<table>
<thead>
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<th>Support Materials</th>
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<td>Power Point Papers</td>
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**Persga** - "the Regional Organization for the Conservation of the Environmental of the Red Sea and Gulf of Aden" is an intergovernmental organization dedicated to the conservation of coastal and marine environments in the region.

Operating from Jeddah on the Red Sea, Persga is responsible for the development and implementation of regional programs for the protection and preservation of the unique ecosystem and high biodiversity of this region.

**Persga: Where it all began?**

Persga’s origins can be traced back to the early 1970s when the Arab League Educational, Cultural and Scientific Organization (ALECSO) initiated a program for the protection of the environment of the Red Sea and Gulf of Aden. Persga’s legal basis stems from the Regional Convention for the Conservation of the Red Sea and Gulf of Aden, known as the Jeddah Convention, signed in 1982.

Persga, the regional organization, was established in September 1995 under the umbrella of the Arab League.

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**IUCN CEC - the IUCN Commission for Education & Communication** - is a global network of experts in education and communication to support IUCN in its mission.

**IUCN CEC**

IUCN - CEC supports worldwide IUCN members in building their capacity to reach out effectively to target groups who are not experts in biodiversity, but who are vital to plan and implement biodiversity strategies.

**Introduction to IUCN - The World Conservation Union**

**IUCN's Mission:**

Influence, encourage and assist societies to conserve the integrity and diversity of nature and ensure any use of natural resources is equitable and ecologically sustainable.

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**CEC**

IUCN - CEC supports worldwide IUCN members in building their capacity to reach out effectively to target groups who are not experts in biodiversity, but who are vital to plan and implement biodiversity strategies.

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**Persga**

- "the Regional Organization for the Conservation of the Environmental of the Red Sea and Gulf of Aden" is an intergovernmental organisation dedicated to the conservation of coastal and marine environments in the region.
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**IUCN CEC**

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Module 2:
What is communication?
Module 2: What is Communication?

I. Objectives

After this module, the participants will

- have brainstormed on the concept of communication vis a vis education
- have first understanding that effective communication is about people, establishing relationships, about getting under the skin of the so called receiver of communication.
- will have understanding of the role of internal and external communication, and will have analysed the role of internal and external communication in their own organisation
- understand the policy life cycle concept and are able to adapt it to real life natural biodiversity conservation projects
- that different phases of the cycle imply different target groups, different objectives and a different role of communication
- that for every communication problem the phase in the life-cycle has to be assessed

II. Programme

1. the concept of communication vs. communication
2. communication models
3. internal vs. external communication
4. perceptions of roles
5. the policy life cycle

III Working Methodology

1. Concepts of communication / education

Duration: 45 min.
Role other facilitators: no specific role
Procedure:
- Introduction to the exercise: When preparing a communication project, it is important to understand what each of us is talking about. We need to agree on some terms like communication / education (1 min)
- Introduction to the technique: Brainstorming: building on ideas as people throw them up, others give leads to being creative, no judgement, no explanation, just an inventory of ideas (3 min)
- Brainstorm: what is communication? Call out key words that describe what we mean. Are there missing elements? (5 min)
- Brainstorm: what is education? Call out key words that describe what we mean. Are there missing elements? (5 min)
- In 2 groups decide how the ideas should be clustered. Summarise each cluster with a key word (10mins)
- Present the key points to the others (10mins)
- How do education and communication relate to each other? Conclusions & reflection: what did you observe in this process? (different perceptions, can find common elements, change ideas when discuss). Plenary discussion (10 mins).
2. Communication basics

**Duration:** 30 min.

**Role other facilitators:** no specific role

**Procedure:**
- Show cartoon and ask the group what they see. Invite discussion on aspects of communication: sender, receiver, message, perceptions. (10 min)
- PowerPoint presentation introducing simple models of communication: one-way or two-way (feedback loop), informal and intended, functions and objectives of communication (20 min)

3. Internal vs. External Communication

**Duration:** 30 min.

**Role other facilitators:** no specific role

**Procedure:**
- External communication. Ask one participant to explain what this concept entails. Let group react. Ask for illustrative examples from own context. Use PowerPoint slides to give examples of different ‘real life’ objectives of external communication (15 min)
- Give examples of different ‘real life’ objectives of internal communication, using PowerPoint slides. Ask for reactions from the group: do you recognize this? (10 min)
- Group discussion: does the concept of communication become clearer, step by step? (5 min).

4. Perceptions of roles: Government – NGO’s

**Duration:** 30 min.

**Role other facilitators:** assist with pinning and clustering cards

**Procedure:**
- Explain purpose: to clarify and understand perceptions about people’s roles in different sectors and at different levels. Without role clarity it can be difficult to do team work. This is to help participants see themselves as others see them and to create willingness to compare and discuss mutual role expectations
- Divide the group into government / NGO. Give one group a red marker, the other a black one.
- Ask the government group to define their own role – as they see it - in environmental communication on a blue card- and the role of NGO in environmental communication on a yellow.
- NGOs write their own role on a yellow card, and the role of government in environmental communication on blue.
- Place each report horizontally with the cards matched in colour so that the roles can be read vertically. Compare the perspectives of the government and NGO roles.
- Discuss in the large group the discrepancies in views about each role and the implications for future team planning. Ask for suggestions on how to work together more effectively.

5. The policy life cycle

**Duration:** 30 min.

**Role other facilitators:** no specific role

**Procedure:**
- Show and distribute graph of policy life cycle and discuss four phases. Ask if participants recognise these phases in their own work. Discuss.
- Explain different functions of communication in each phase. Discuss how this should be reflected in a communication strategy.
- Group exercise: when would certain media be effective, when not? Choose one specific example (focus group, or tv campaigns)
IV. Support Materials

For this module, one will need coloured cards, markers, masking tape, a flipchart and an overhead projector or beamer. **Attached to this module, one will find:**

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“The PowerPoint sheets can be used as transparencies during a presentation or can be distributed as handouts.”
**Checklist on environmental education**

Aim: to encourage and assist societies in conserving the integrity and diversity of nature, and to ensure that any use of natural resources is equitable and ecologically sustainable.

- Education is communication in an organised and sustained manner
- To bring about changes in attitudes, values, practices, or knowledge and determination to act
- Based on problem solving - emergent
- Based on good communication = listening as well as talking.
- Based on what people know and want to know
- Common perception: one way flow on information
- Usually in schools
- Disciplinary, atomistic, individual
- Knowledge for the future - knowledge precedes its application
- Theory
- Passive learning
- Part of mix of subjects that have to be learnt for exams
Checklist on Environmental Communication

Environmental communication is the strategic use of communication with other instruments to support and promote environmental policies and projects and to make them more effective through closer relationships with the actors involved.

**Characteristics**

- Commune = to be one of spirit, trust, share,
- participatory and two way
- one of coherent set of instruments to cope with environmental problems: an instrument among regulatory and economic instruments
- all implicated stakeholders should be included to promote ownership and involvement in the activity
- messages and means have to be carefully tailored for the recipient group
- planning ensures the necessary actors are involved and messages and means reach them at the appropriate time in appropriate ways
- a feedback loop is included so that information received in dialogue can be incorporated into the communication

**Benefits of Environmental Communication**

- Provide factual information to those who will be affected by environmental development projects.
- Raise awareness amongst beneficiaries of a project and motivate them to participate in the process so as to create participants instead of recipients of policy.
- Facilitate acquisition of information about audiences, to better target messages for them and understand their concerns.
- Enhance participants involvement in planned environmental programs by making available many opportunities for input, and actively soliciting it.
- Help reduce negative environmental and social attitudes and behaviour among policy makers and citizens.
- Help efficiency of project activities through their smooth operation and through community understanding.
Checklist: When to use inter-active policy making?

Yes:

- When there is mutual inter-dependence
- When contradictory interests are more or less the same size
- When stakeholders are able to communicate with each other and with there parties
- When stakeholders are innovators and early adapters

No:

- When substantial differences in power exist
- When contradictory interests differ to much (then top down interventions are needed)
- With real innovations (f.e. new technologies and developments like solar applications)
- With extreme complicated issues (f.e. the impact of big infrastructural works like dams)
- When extreme principles and believes are involved (f.e. extremist interest groups)
Checklist Internal communication

Internal Communication means & channels

- In-house Newsletter (electronic or printed): regularly, short info about recent facts and events, easy to make, reproduce and distribute.
- In-house Magazine: less frequently than newsletter, more in depth articles, of interest to wider audience (relatives, former employees, etc.), send to home addresses not to work.
- Employee Orientation Manual (electronic or printed): to introduce new staff, practical information on the organisation (NB regularly updated).
- Policy Manual: providing information on the history and mission of the organisation, its current policies and activities (NB regularly updated).
- Orientation Programme: introductory program to new staff, so that they quickly get to know the organisation and its activities (it can include meetings, guided tours, mentorships etc.)
- Bulletin Boards: cheap and easy way to distribute info quickly. If placed at a strategic location (near the lift, photocopier, coffee room etc.), they are usually well read. Through bulletin boards one does not reach external or mobile staffs. They often look messy (the media is the message!), so they are not fit for all messages. Now there also exist digital bulletin boards and websites.
- Meetings: regular staff and work meetings are a good way to stimulate internal communication. They are useful if they allow for two-way communication: staff should have as much chance to put issues on the agenda as management. Meetings should not only be used to distribute information, but to generate more support in the organisation for its mission, priorities and current campaigns.
- Social events: excursions, dinners, pizza lunches, celebrations. They can be small and need not to be extravagant. They are very useful for two way communication and informal brainstorming and professional information exchange.
- Skill development: giving staff the opportunity for training makes them feel more at ease, and most training offers opportunities to develop negotiation and communication skills.
- Awards: schemes like ‘employee of the month’ give staff recognition for important achievements, so do magazine or newsletter articles highlighting successes accomplished by employees.
**Checklist on adult learning**

*Adults learn best when (extracted from Malcolm Knowles, Kurt lewin, Paulo Freire)*

- Learning is accomplished through dialogue because it is a mutual learning process and perceptions are based on individual experiences.
- They feel respected as responsible self-directed learners.
- They feel their knowledge and experience are valued and can be shared.
- People believe more in knowledge that they discover themselves than in knowledge presented by others.
- Learning requires first awareness and then an examination and analysis of the causes of their problems and promotes actions.
- Learning is more effective when it is an active process—learning happens when there is reflection on the action to learn from it.
- They feel able to trust, sense safety in the learning environment.
- See how the skill or information is relevant to their lives or their work.
- See that the information or skill is immediately useful in performing tasks or to deal with problems they confront in their lives.
- Behaviour change is temporary unless the reasons for and attitudes underlying them are changed.
- For changes in behaviour patterns, attitudes and action theories to be permanent, both the person and the social environment have to change.
- People remember 20% of what they hear, 40% what they hear and see; 80% what they discover themselves.

**Empowerment approach**

- Provide a support framework to enable communities to become self-reliant. Facilitators provide a framework for thinking and acting, provide information and assist with tasks such as monitoring and reporting.
- Support what people do. Assumption: if we join our knowledge, ideas and resources together we can solve problems.
- Community identifies problems and solutions, implements, then evaluates the actions supported by NGO staff.
- Community owns the program and takes responsibility for success and failure.
Fact sheet Communication is only part of a Mix of Instruments

To solve policy issues a government has various instruments: laws and regulations, financial (dis) incentives and taxes, information and awareness raising. Communication is only one of these instruments and mostly only effective in a mix with other instruments. In most case communication alone cannot solve the problem.

Case :
Every weekend, a National Park receives a few hundred visitors from the nearby cities. These people do not enter the park but stay close to the parking lot at a small but especially for the purpose designed area to barbecue and enjoy the nice weather and the idea that they are out in nature. When they leave, they leave a terrible mess behind. The Park finds it more and more difficult to invest in more cleaning personnel. The director of the park does not want to use the wardens or the local police to patrol and enforce a better environmental behavior, as he really considers this group as good ambassadors and supporters of the park. Instead he has put up nice signboards requesting the visitors to leave the place as clean as they have found it. The Director doesn’t understand why there is no improvement even with these signboards. Finally, one of the wardens comes to him and asks how the visitors could clean up after themselves, as is asked in the signboards, if there are not enough waste baskets?
Lessons learned: in most cases communication alone cannot solve the problem, one also needs to provide people with the possibility to act. Communication than supports the use of those provisions.
**Fact sheet ‘Internal communication first’**

One can distinguish between internal and external communication. Internal communication is the communication within the organization. External communication is the communication by the organization with (persons or organizations) in the outside world. One of the main rules of communication for organizations is: before you communicate externally, make sure internally everyone feels the same about the issue and expects the same from the project.

**Case**

The management of a Protected Area wants to raise the profile of the PA among the population inside the protected area. As one of their actions points, the management would like the village schools to engage in environmental education. A teacher is interested to take up this challenge and phones the office. The telephone is not answered. She rings the next day. Same effect. Another day, somebody picks up the phone and listens to the request to talk about an excursion to the area by a school class and answers: I do not know about this all and I have no time for it. The teacher drops the idea.

Lesson learned: external communication starts with internal communication: make sure the whole organization knows the new mission and how to contribute to it.

**Case**

A Ministry of Environment is implementing the Convention on Biological Diversity (CBD) and draws up a national Biodiversity Strategy. Especially for this project, a new expert is appointed. The new project officer starts to work and after a year of hard work and feedback from external experts and some stakeholders in biodiversity the first drafts are ready. He presents the draft strategy in a meeting with the directors of the Ministry and gets as feedback that half of the proposals is already covered by existing activities of other directorates and that what he proposes is impossible given the existing relations with the Ministry of Agriculture.

Lesson learned: external communication starts with internal communication: get feedback as you go along, for getting it at the end is too late.
Fact sheet Communication Sequence

*Said is not always heard…’*

Often we assume that because we have said or written something, people will act on this information in the way we desire. But communication is about establishing a relationship of shared values, meanings, interests and actions. People have their own ideas, values, experiences, and they explain every message they receive on the basis of this ‘background film’. Communicators should therefore always realize that:

*Said is not necessarily heard*

Heard is not necessarily understood
Understood is not necessarily agreed upon
Agreed is not necessarily acted upon
Acted is not necessarily repeated

*Case*

The management of a Protected Area (PA) is concerned about the plants on the river dikes, which are in danger as farmers are mowing too early in the year. They want to inform the farmers about the best date to start mowing by printing a small leaflet explaining the need and background of mowing on a later date. They announce in the Newsletter of the Protected Area that farmers can obtain this leaflet at the mayor’s office. That year, farmers still start mowing too early. No leaflet has been collected, as farmers do not read the PA newsletter. It is also questionable if they would have gone through the trouble of collecting a leaflet at the mayor’s office.

Lesson learned: what is said is not necessarily heard.

*Case*

Through the local police the PA manager is informed about their mistake and the next year they put up a huge poster at the entrance of the church where all farmers go on Sunday to celebrate. The poster explains the scientific facts and gives biological information on the importance of biodiversity and asks farmers to collect the leaflet at the mayor’s office. No leaflet is collected and that year again, the farmers start mowing too early. One day, after church, the PA manager talks with one of the farmers and hears that the expert language was not understood, so the farmers thought that the message was not really important for them.

Lesson learned: What is heard is not necessarily understood.

*Case*

The manager has learned his lesson. The next year a new simple poster was made directly giving the main message what to do: only start mowing from 18 June onwards. Alas, again no result. Although the farmers did receive and understand the message, they did not agree. They are very religious in that area and found it insulting to their religion that the poster was suggesting that they should start mowing on a Sunday.

Lesson learned: what is understood is not necessarily agreed with.
Case
The PA management does not give up, and vows not to repeat the same mistake next year. New posters are designed with the same, simple message, to start mowing only after Monday the 17 of June. But the result is the same. The farmers start mowing too early. By now, the manager is desperate. He talks to the local police and asks if the police could not help the PA. But of course, pure law enforcement is not the answer. By mowing later in the season the farmers are loosing an extra quantity of hay for their cattle and that hurts their business. When they are not properly compensated financially, they will not change their behaviour if it means losing income. Even if one would inform them with thousands of brochures and posters.
Lesson learned: What is agreed with is not necessarily acted upon. People only change their behaviour after carefully weighing the costs and benefits of the change you ask from them.

Case
The PA area finally gets its act together and calculates what average damage farmers will have. In dialogue with some opinion leaders from the farming communities they formulate an attractive proposition: farmers who mow at the right date will receive a nice financial bonus with a minimum of bureaucracy involved. That year most farmers start mowing at the right time. The PA manager is happy and satisfied. But the next year it goes wrong again. The farmers had forgotten the date; they were not notified in time.
Lessons learned: acted upon does not necessarily mean repeated! Behaviour change to become permanent has to be followed by positive feedback and reminders.
Module 2: What is Communication?

Communication: a two way process,
- Informal communication
- Intended targeted communication

Functions of communication
- Communication about
- Communication as an instrument of

Objectives of communication
- Knowledge
- Awareness
- Attitude
- Behaviour
- Networking
Internal vs. External communication

Communication is intended to:
- provide knowledge and insight concerning the policy and management objectives of the organisation
- so as to achieve a positive attitude both within and outside the organisation

Internal vs. External communication

External objectives (1):
- Planners will be prepared to incorporate nature conservation aspects into their planning behaviour
- Financing organisations are prepared to finance activities to preserve biological and landscape diversity

Internal vs. External communication

External objectives (2):
- A sufficient number of good quality new employees can be recruited
- Public opinion will not be a threat to the organisation

Internal vs. External communication

External objectives (3):
- Visitors of protected areas will be prepared to actively support activities to safeguard biological diversity
- Fishermen will be prepared to stop all activities that cause degradation of natural resources and ecosystems
- Media representatives will be prepared to use positive messages in their media

Internal vs. External communication

Internal objectives (1):
- Employees are willing to perform their tasks in an efficient and effective way.
- Employees are willing to align their attitudes and practice as closely as possible to the desired corporate identity.
Module 2: What is Communication?

Module 2

Internal vs. External communication

Internal objectives (2):
- Employees have a receptive attitude towards change during reorganisation and quality improvement projects
- Employees are prepared to be good ambassadors of the organisation

Module 2

The project / policy life cycle

Module 2

Interactive communication in all phases of policy

<table>
<thead>
<tr>
<th>Identification phase</th>
<th>Formulation policy</th>
<th>Implementing policy</th>
<th>Management &amp; control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder consultations</td>
<td>Facilitate consensus negotiation</td>
<td>Relations, information, monitoring, expertise</td>
<td>Stakeholder communication</td>
</tr>
</tbody>
</table>

Module 2

The life cycle (1)

Policy or project making is a cyclic process of four main stages:

Phase 1: Identification the issue: agenda setting. Communication serves to identify problems early by listening to people. Methods used:
- Stakeholder consultations
- Surveys (opinion, attitude)
- Media analysis
Module 2: The life cycle (2)

Phase 2: Formulating the policy.
At this stage, communication can serve to raise awareness or understanding of the policy proposals and the issue. Methods:
- KAP surveys
- Facilitate consensus negotiation
- Communication strategy design
- Integration of communication in mix of policy instrumenys.

Module 2: The life cycle (3)

Phase 3: Implementing the policy or project.
Aim of communication is now to inform target groups on how to proceed, to communicate the core message of the policy (or project) and accompanying measures. Methods:
- Information campaigns
- Specific materials
- Marketing, education
- Stakeholder communication

Module 2: The life cycle (4)

Phase 4: Management and control.
At this stage communication serves to sustain changed attitudes and behaviour. Methods:
- Relations, information monitoring, networking
Module 3:
The role of communication in nature conversation
Module 3: The Role of Communication in Nature Conservation

I. Objectives

After this module, the participants understand

- How communication is an underlying component supporting all technical components in nature management.
- The difference between conservation and communication objectives.
- The role communication can play in support of conservation objectives.
- How to analyse internal and external barriers and success factors in communicating biodiversity conservation.
- Assess the role of communication in conservation at regional, national and local level; and link it to their own situation.
- How to selected/define an issue; this process will involve: making an effective group decision, brainstorming, analysing, selecting and preparing a presentation, delegating tasks, making a selection based on criteria such as time, money, quality, information, organization and feasibility.

II. Programme

1. Recap of communication basics, link to conservation
2. Communication versus conservation objectives
3. Role of communication in obtaining conservation objectives
4. Barriers and success factors
5. Selecting a national issue

III. Working Methodology

1. Recap of communication basics, link to conservation

Duration: 10 min  
Role of other facilitators: no specific role  
Procedure:  
1/Question & Answer (Q & A) type discussion to summarise lessons learned from module  
2/What is communication? What are functions of communication? Internal and external communication?  
What are the phases in the life cycle of a policy or project?  
3/Why is it important in conservation issues as well?

2. Communication versus conservation objectives

Duration: 30 min  
Role of other facilitators: no specific role  
Procedure:  
- Ask group: what is an objective?  
- Give short briefing on communication vs conservation objectives  
- Ask group for examples (fictive), invite discussion
3. **Role of communication in obtaining conservation objectives**

**Duration**: 45 min  
**Role of other facilitators**: no specific role  
**Procedure**:  
- Present case study from own experience; use PPT slides but present it as story telling  
- Ask the participants to share similar experiences. How is communication being used in your project/NGO/Government?  
- Ask participants to submit one example each by the next morning (1 page A4 maximum, to be shared with participants)

4. **Barriers and success factors**

**Duration**: 30 min  
**Role of other facilitators**: no specific role  
**Procedure**:  
- Give short PowerPoint presentation and discuss  
- Invite sharing of examples

5. **Selecting a national issue**

**Duration**: 50 min  
**Role of other facilitators**: time management, general assistance  
**Procedure**:  
- Explain exercise (10 min): the participants will select a conservation issue they will work on during the training and which they will want to make operational in the coming weeks at home. In Module 6, the participants will develop a communication strategy for this issue.  
- The issue must be a marine conservation problem in the participants’ country, not too large and with a clear and limited number of stakeholders. It must be an issue in which communication can play an important role.  
- Depending on the group size, divide the group into 2 or 3 working groups, who will each work out one issue for the remainder of the training (max 4 participants per group). Make sure the groups are balanced (in terms of background, experience, communication skills, gender)  
- The groups will define the issue (10 min) and present it to the plenary using 1 transparency sheet (5 min), upon which it will be evaluated (5 min).

**IV. Support materials**

Attached to this manual, PowerPoint sheets are available to be used in the presentations of the theory. Some case examples have been attached as well that can be used. Users of the manual are encouraged to add more relevant regional examples to illustrate the role of communication in conservation programmes. 

**Attached to this manual, one can find**: 

<table>
<thead>
<tr>
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</tr>
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<tr>
<td>Power Point Papers</td>
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</tr>
</tbody>
</table>
Fact sheet Communication Basics

‘What is communication?’

Nature conservation is a complex field that involves many different players (stakeholders) from different sectors. Environmental projects often fail to succeed because the people or organisations concerned are not reached or do not support the project. Project managers often think that technical measures are enough. In most cases however, communication is at least part of the solution, and often it is a crucial part. Often, ambitions of communication are not met. Even worse, communication can have negative side effects when used in the wrong way. There are many potential obstacles in the communication process.

When a person or organisation communicates, the purpose is usually to bring a certain message across. Other people and/or organisations need to know and understand something. In many cases the ambitions are higher. People and/or organisations need to change their attitudes, they need to change the way they look at a certain issue and the way they feel about it as an effect of communication. And sometimes a change in attitude is not even enough. The desired effect of communication is often the change of behaviour.

Case

In a bay close to a city many different shell species grow. Inhabitants of the city collect the shells for eating. A few rare species are threatened. To protect these species, the local authority introduces a new regulation restricting the collection of those shells. Possible aim of communication is to inform the collectors about this new regulation (knowledge). But knowing about the regulation does not imply that the shell collectors stop gathering rare species. The people need to believe it is in the best of all interests that rare species should be protected (attitude). Even when the shell collectors agree with the regulation and understand the reasons for implementing it, this does not necessarily mean they will obey (behaviour). They might keep gathering the rare species because of the money they make selling them. If the desired change of behaviour has more individual disadvantages than benefits, communication is not enough. Other measures are necessary. For instance, transgressors need to be fined.

When the changing of knowledge, attitudes and behaviour is the aim of communication, the ‘sending’ of messages is often the main concern of the communicators. But anyone who believes that communication is mainly about the sending of messages, is mistaken. In many cases listening to the people involved is more important. One must know the perceptions of the people who are involved, the language they use and the way they can be reached.
Module 3: The Role of Communication in Nature Conservation

Communication objectives versus conservation objectives

- One in support of other
- Direct or indirect

Role of communication in obtaining conservation objectives

Illustrative case studies

But of course next time…
Use your own, national or regional case studies!

Experiences from: Slovenia (1/3)

- In Slovenia, village ponds were being neglected because of changes in lifestyle.
- This meant loss of biodiversity but people were not interested: what is biodiversity to us? They asked? Project failed.
- The Authority did not give up, but went back with open agenda. Let’s hear what every- one has to say. What could be uses for ponds?

Experiences from: Slovenia (2/3)

- The new round tables were really open minded (communication is about listening!!)
- One village decided to work on restoration. Results were celebrated & published in local media. Frogs & plants come back, the clean water is used for Irrigation for wine
- This triggered interest of neighboring villages. They also want this!
- 2002: Many villages apply. Target: 100 ponds in this project phase!

Experiences from: Slovenia (3/3)

- Lessons learned: allow yourself to make mistakes, and to be flexible. Try again!
- Sometimes indirect is better than direct. People were not interested in biodiversity, so try to find other point of common interest.
- Allow time for the process: now the basis on which the people cooperate is very strong and it will endure until after the project.
Module 3

Barriers in communicating nature conservation

Why is environmental communication so complex?
- Scale of problem of biodiversity conservation:
  - Uncertainty about the scale of the problem.
  - Duration in time to see improvements or deterioration.
- Separation of cases and effects of unfriendly behaviour.

Module 3

Perceptions towards changes in environmental behaviour

- Own benefits are more important than collective disadvantage.
- No confidence in the cooperation of others (‘after you’ effect).
- No confidence in your own behaviour (drop in the ocean).
- We can not go back anymore (society is like that).

Module 3

Stimuli in communicating nature conservation

- Relevance to people’s life.
- Credibility sender (if he says so…).
- Attraction sender (perception often: nice person: correct opinion).
- Number of people that agree (if everyone believes it, it must be true).
- Number of arguments in message.
Module 4:
Stakeholder segmentation
Module 4: Stakeholder Segmentation

I. Objectives

This module aims to create insight in the actors in a conservation issue, and how they can influence communication objectives. Participants will:

- learn how to identify different actors.
- learn how to assess their role in, perception of and possible impact on the conservation issue.
- have an understanding of the do's and don'ts of stakeholder management.
- have applied the principles of stakeholder management to similar cases in their own country and
- made a list of pro's and con's of this approach.
- have determined to which target groups their communication activity will be directed to provide the added value to the issue.
- understand the necessity to segment and analyse target groups.
- understand that a target group is a group of people (of flesh and blood), which is vital to the solution of the issue.
- have analysed and described their target groups according to various methodologies.
- understand that analysing the target groups may lead to a reformulation of the role of communication.

II. Programme

1. Who are the actors?
2. Why and how to segment stakeholders?
3. Who is important to the conservation issue? Define and prioritise target groups
4. Perceptions and realities: target group analysis.

III. Working Methodology

1. Who are the actors?

Duration: 20 min  
Role of other facilitators: make notes on flipchart  
Procedure:
- Introduction: why is it necessary to look at the actors in an issue? What are stakeholders? (interactive presentation)
- Pick one of the issues defined by the groups. Q&A: who are actors in this issue? Who have a stake in the issue? Who can influence the issue, and whom does the issue influence? Make a complete list of stakeholders.

2. Why and how to segment stakeholders?

Duration: 20 min  
Role of other facilitators: no specific role  
Procedure:
- Why segment stakeholders? Strategic reasons (know who you are dealing with); Practical reasons (limitations: time, budget or manpower is short)
- How to segment? Continue with same issue. Ask group to answer these questions: which of the listed stakeholders have the most impact? Who will be most crucial for you to achieve your objective? In other words: what are primary and what are secondary stakeholders? Which are intermediaries through whom you could reach others?
3. **Who is important to the conservation issue? Define and prioritise target groups**

**Duration:** 30 min  
**Role of other facilitators:** no specific role  
**Procedure:**  
- After segmenting the stakeholders, the group is ready to decide which stakeholders are most important to be targeted at this moment in this communication programme. Select 2 or 3 target groups (10 min)  
- Define your target group: divide the group into 2 or 3 subgroups (as many as you have target groups). Without any further briefing, each subgroup will prepare a description of its target group (10 min).  
- The target groups will be presented to the plenary. Ask the group: is the description accurate? Do we know everything we need to know to target a successful communication programme to this group? (10 min).

4. **Perceptions and realities: target group analysis**

**Duration:** 1 hour 20 min  
**Role of other facilitators:** collecting contributions  
**Procedure:**  
- Presentation: what is a target group? Characteristics can be defined: demographically, socially, politically, by lifestyle, attitude, cognitive state…. (10 min)  
- Draw and discuss: the pyramid/hierarchy of individual needs (15 min)  
- Exercise: matrix. Explain the method of analysing the perceptions of an issue by using matrix (10 min).  
- Use the same subgroups. Each subgroup will fill matrix for one target group: what are the social, economical and ecological perceptions of the issue for this target group? (10 min). The groups will explain (5 min each) and the plenary will complete if anything is missing (5 min)  
- Evaluate: are we now better prepared to work with these target groups than before we did this analysis? What do we miss? What else would we need? (15 min)  
- Reminder to the group: you will use these techniques in the preparation of your communication strategy in the next module!

**IV. Support materials**

Attached to this manual, PowerPoint sheets are available to be used in the presentations of the theory. Some of the sheets, such as the pyramid and the matrix, could be distributed as handouts.  
**Attached to this manual, one can find:**

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<td>Fact Sheets</td>
<td>-</td>
</tr>
<tr>
<td>Power Point Papers</td>
<td>1</td>
</tr>
</tbody>
</table>
Checklist Identifying Stakeholders

Identifying stakeholders

Case:
The management of a protected area intends to expand the boundaries of the protected area to include all of an important marine area covering a mangrove forest, which presently lies partly outside.

Primary Stakeholders
- whose permission, approval or financial support do I need to reach my goal?
  - Regional Nature Conservation Authority
  - Ministry of Environment
  - Ministry of Aquatic Resources
  - Ministry of Regional Planning
  - Etc.

- who is directly affected by my plan or activity?
  - Landowners and or residents in the area
  - Forestry companies
  - Tourism operators
  - Recreational and other users (hunters, bird watchers, bikers, hikers, riders etc.)

Secondary Stakeholders
- who is indirectly affected by our plans?
  - Local business
  - Landowners and or residents not inside the protected area but near
  - Environmental NGO's

Tertiary Stakeholders
- Who is not involved or affected, but can influence opinions either for or against
  - Local opinion leaders (church, business or trade union leaders, teachers, local celebrities)
  - Local media
  - Ecology departments of universities, research institutes
  - Environmental inserts or special programs of national media
Checklist Stakeholder Analysis

Analysis stakeholders in biodiversity: what are their characteristics?

**Interest:**

Are they interested in the issue you want to communicate about?
- No interest in the issue makes communication difficult. High interest makes communication easier.
- In cases of low interest, think of ways to link your issues to what is of high interest to them, think of potential benefits for them

**Knowledge:**

How much do they know?
- Determine the knowledge of your target group before you communicate. If there is little knowledge, be prepared to provide a great deal of information before you can expect a two-way communication flow.
- Start always from what they know and speak their language (quite often that means the language of non-experts)

**Attitude:**

How do they feel about the issue?
- If the group has strong feelings against your plan, your ideas will require a lot of time, patience and effort. Sometimes the feelings can be so strong that effective communication becomes impossible for a while. Listening and trying to understand their position is often more effective than arguing.
- If their position is based on (irrational) emotions such as fear, do not try to rationalize but take the emotion serious and try to find common solutions.
- If the group has strong feelings in favor of your plan, communication will be much easier.

**Information Behavior:**

How does the group look for information?
- Do they get information – which is reliable in their perception - from other members of the group, or from local opinion leaders? Do they read newspapers and magazines, listen to radio, watch TV, use internet.
- Will they look actively for information (phone, library, internet, databases etc.)
- Will they attend public meetings and hearings?

**End values:**

What are the beliefs, norms and values of the group?
- Is this a very traditional group or a very unconventional one?
- How formal are they in their contacts with others and especially outsiders?
- What are their specific religious or political beliefs?
- How does our issue connect with their sense of safety, belonging, recognition, etc.
Checklist Target groups

Target group Analysis
Answer in relation to your issue the following questions:

1. which groups of people are involved?
2. which groups are instrumental to solve the issue?
3. can we segment these groups to homogenous groups of people we can define easily?
4. what problems do arise from the issue per target group?
5. what has been done so far towards these target groups?
6. what has been their reaction?
7. what is their involvement in the issue:
   - objective or subjective (personal)
   - high or low (interested, committed)
   - risk perception (money, reputation, status)
8. what do they know about the issue?
9. what is their perception of the issue?
10. what is their main attitude/wish/desire with regard to the issue?
11. what is their current behavior with regard to the issue?
12. what is an obstacle for them to think or act as we would like:
    - what are benefits for business as usual
    - what do they perceive as costs to change their attitude, knowledge, behavior
    - what would make them change their mind
13. what else do we know about the target group:
    - name & address data
    - demographical data
    - psycho- graphical data
    - lifestyle data
    - attitudinal data
    - cognitive data
14. who is a credible sender for this target group:
    - which newspapers, magazines they read
    - who are their peers, bosses
    - which places do they frequent
    - to whom do they listen in general
    - how credible are we ourselves
Module 4: Stakeholder Segmentation

why bother about stakeholders?
- Conservation affects people of flesh and blood
- People can affect the success of your conservation measures (two ways).
- Communication is about people
- Communication does not function as a ‘command and control’ tool.
- If you can’t beat them, join them
- It is about reducing the ‘black box’ of AIDA

what is a stakeholder?
- Groups of people who are instrumental to realize the objective: they can influence the outcome
- Groups who will be influenced by the conservation programme, and can therefore be barriers or success factors

Segmentation of stakeholders (1)
Why segment stakeholders?
- Strategic reason: Know who you are dealing with!
- Practical reason: Prioritise!
  Limited resources (time, budget, manpower) do not allow you to target all stakeholders.

Segmentation of stakeholders (2)
Ask yourself:
- Who has most impact?
- Who will be most crucial for me to achieve my objective?
- Is this now or a later stage?

This will give you:
- Primary and Secondary stakeholders
- Intermediaries
- Ready for target group selection

What is a target group?
After segmentation of stakeholders, one can decide which group to target

Target groups can be defined:
- Geographically
- Demographically
- By Age
- By Lifestyle / Livelihood
- By Attitudinal & cognitive state
- Others (define!)
Module 4

Target group analysis: hierarchy of individual needs (1)

- Tool to understand people's individual needs
- One's individual needs will influence his motivations and decisions (attitude and actions)

Pyramid:
- Without going through the bottom layers, the top cannot be reached
- Wide bottom layer, small top. Few people fulfill the top needs.

Module 4

Target group analysis: Matrix (1)

- To be prepared for the different reactions to a conservation issue, analyse the perceptions of the target groups
- People can look at an issue thinking of social, ecological or economical importance
- Also analyse your own perception, realise what the differences imply!

Module 4

hierarchy of individual needs (2)

Module 4

Target group analysis: Matrix (2)

The issue:

<table>
<thead>
<tr>
<th>Importance</th>
<th>Social</th>
<th>Economical</th>
<th>Ecological</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
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<td>2.</td>
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</table>
Module 5: Target group research: Finding effective approaches
Module 5: Target group research: finding effective approaches

Objective: After this module the participants have an understanding of the effort it takes to creep under the skin of the target group. It is a deepening of the lessons learned in module 3. The module consists of two parts: a) a role-play to exercise and experience the differences in roles and perceptions of an issue between stakeholders b) to experience the same in a real-life situation, the participants will go on a field visit during which they will meet different stakeholders to a conservation issue.

PART A: Role Play

I. Objectives

The participants will:

- understand the effort it takes to creep under the skin of your target group.
- be aware of the attraction to first discuss the contents of the issue, to come to an insight of each other’s perception
- understand that once such inventory is made, it will be easier to set up a process of establishing relationships and defining common ground and common objectives
- understand the special role of a facilitator in these processes
- understand how communication can be a vital to guide these processes to a successful outcome

II. Programme

1. Introduction
2. Role play in small groups
3. Plenary exchange of experiences
4. Plenary role play
5. Plenary conclusions

III. Working Methodology

1. Introduction

Duration: 30 min.
Role other facilitators: assist in explaining case if needed
Procedure:
- If needed, summarise communication basics
- Explain objectives and methods of role play
- Introduce the case (draw map on flipchart)
- Give instructions for the group work

Note: in case the group is small or the participants are unfamiliar with role plays, it can be decided not to split into smaller groups. In that case, the role play can be done with the same group, first with, and then without facilitator
2. Role play in a small group

**Duration:** 60 min.
**Role other facilitators:** facilitating role play
(NB in role of facilitator!)

**Procedure:**
- Explanation of objectives (to experience different interests and to understand the meaning)
- Open communication;
- Explanation of methods (see instruction sheet);
- Role play (idem);
- Evaluation.

3. Plenary exchange of experiences

**Duration:** 30 min.
**Role other facilitators:** no specific role

**Procedure:**
Participants are invited to summarise lessons learned;
An inventory is made of general conclusions.

4. Plenary Role Play

**Duration:** 60 min.
**Role other facilitators:** supporting the country groups

**Procedure:**
- Introduction on objectives: to understand the various steps (convening, understanding each others agenda’s, setting a common agenda, exploring and defining issues for interactive policy making, exploring and defining areas where win situations might be found, exploring procedures to get there) the process of interactive policy making and the role communication plays in underpinning these steps.
- Introduction on method (see instruction);
- Role play

5. Plenary Conclusions

**Duration:** 30 min.
**Role other facilitators:** no specific role

**Procedure:**
- Participants are invited to summarise lessons learned;
- An inventory is made of general conclusions.
PART B: Field Visit

I. Objectives

After this module, the participants will:
- Understand the positions of stakeholders through practical ‘real-life’ discussion with National Park Stakeholders during a field visit.
- Gain a better understanding of the processes of analysis of their views, feelings and motives with regard to one or more nature conservation issues. To provide.
- Understand that interview, listening and discussion techniques are first steps towards effective communication.
- Understand the dilemma of choices particularly with regard to resource allocation (limited time, budget and manpower).

II. Programme

1. Plenary preparation of field visit
2. Field visit
3. Plenary evaluation

III. Working Methodology

1. Plenary preparation of field visit
   
   Duration: 1h30
   Role of other facilitators:
   Procedure:
   - Plenary meeting possibly in the protected area venue
   - Short recap of module 5: stakeholder segmentation, with special emphasis on analysis of needs and perceptions (matrix, pyramid)
   - Division into three groups (Note: depends on number of participants and number of targeted stakeholders) to prepare for meetings with 3 different stakeholders: park management, fisherman and tourism industry.

2. Field visit
   
   Duration: 4 hours
   Role of other facilitators: join groups for observation purposes
   Procedure:
   The following division of tasks depends on the field visit chosen. In this example, it is assumed that the group visits a coastal protected area.
   - Plenary meeting with National Park staff, welcome and introductions
   - Short tour and introduction to the area
   - Division into three groups (Note: depends on number of participants and number of targeted stakeholders)
   - Group 1 will have a discussion with a representative of Park Management to identify communication issues and opportunities
   - Group 2 will meet with a local fisherman to discuss nature conservation
   - Group 3 will have a discussion with a representative of the local Tourist Industry.
Groups of participants will take turns to interview/talk to the stakeholders, while others observe the process.

3. Plenary evaluation

Duration: 45 min  
Role of other facilitators: share observations  
Procedure:  
- Plenary sessions will consider what worked and what did not work?  
- What solutions or plan of communication might be offered?  
- Summarise reminders & lessons learned when dealing with different stakeholders

IV. Support materials

The attachment to this module can be printed and distributed as handouts. One set has been developed for the facilitators if the role play, the other set for the participants.

Attached to this module, one can find:

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<tr>
<td>Model of a Role Play</td>
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</tr>
</tbody>
</table>
Checklist Interviews (Example: case training workshop)

1. PERSONAL DATA
   - Informed about the initiative?
   - Informed about interview?
   - Name, address etc correct?
   - Name Organization correct?
   - Title and name of your function correct?
   - What are the main projects you are involved in?
   - You have your own desk/room?
   - How long are you in this position?
   - What are your ambitions?
   - What age are you?
   - What type of budget, personnel are you responsible for?
   - What is your place in the organization?
   - What do you most of the day?

2. BIODIVERSITY & COMMUNICATION
   - How far are you familiar with biodiversity?
   - What type education and communication projects for nature conservation are you involved in?
   - What materials do you use (brochures, newsletters, TV)?
   - Which are the main obstacles you encounter in your work?

3. TRAINING WORKSHOP
   - How were you approached for this workshop?
   - What in the workshop appeals to you?
   - What would you like to learn and take home?
   - How can the organization accommodate your wishes?
   - Which experience and skills can you share with the participants?
   - Which presentation could you make?
   - Which materials could you bring which can be of interest to others?
   - Which case studies could you present?
   - What is your feeling about working on a concrete project to use/finish at home?
   - What is your feeling on working with others from your/a different count?
Checklist : Preparation of negotiations

Our negotiators:
- Do we use an individual or a team
- Name individual, or name and role team members; name who commits our side

Information on other side:
- Review of past contacts
- Key issues: list of the three most important elements of the issue for them with reasons
- Review their financial status
- Who are their negotiators (what type of person is it?)
- What is his/her relation to the issue?
- What is most important to the negotiator?
- What alternatives to our ideas and to us are available to them?
- What is their funding situation, what are their considerations?
- Who is the DMU; will they be at the negotiations?
- What are their expectations of this meeting?

Key considerations:
- Our understanding of the mission and objectives
- Scope items essential to us
- What are deliverable items?
- What factors affect our schedule?
- What are potential areas of liability

Our position:
- What do we want: Opening position – Goal – Minimum Acceptable Outcome
- Key contract language
- Type of cooperation
- What alternatives do we have?

Preparation for negotiation session:
- Agenda prepared
- Rehearsal of negotiations
- Actual negotiation environment: room size adequate; access to telephones, photocopier, FAX, secretariat help etc.?
- Can noise, light, temperature be caucus in
- Refreshments
‘Fact sheet: Target groups are people of flesh and blood’

A target group is a group people which you need to reach with your communication in order to realize a result (the communication objective, see ..). They are people of flesh and blood. It is best to segment the target group as far as possible and identify the opinion leaders (name, address etc.) to whom face to face communication is possible. It is important to explore how they relate to the issue and which would motivate them to act as desired.

It has to be taken into account that their perception of the issue is the starting point. Information will not convince them. Stronger one has to realize that for any issue there are always many more people not interested in it than that are interested.

Case

A Ministry of Fisheries and Aquatic Resources has developed a Marine Policy Plan, promoting conversion of fisheries activities into nature management activities with financial and institutional support benefiting fishermen who cooperate, but formulating the issue in terms of fishermen as ‘enemies’ of nature. Notwithstanding the benefits in the plan for them, the fishermen do not agree as they feel they always have been managers of nature, they were not consulted and now depicted wrongly, so they do not want to cooperate.

Lesson learned: if you see your target group not as a partner but as an enemy, meaningful communication is not possible; there will be no support for the implementation of your measures or even willingness to listen to you.
Module 5: Target group research: finding effective approaches

Objective of the module
After this module, the participants have an understanding of the effort it takes to creep under the skin of the target group. It is a deepening of the lessons learned in module 3.

Objective of the role play
After the role play, the participants will:
- Understand the attraction to get involved in discussing the contents of the issue, before defining common ground and common objectives.
- Understand through experience that 'perception is the only reality'
- Understand the special role of a facilitator
- Understand how communication can be a vital to guide these processes to a successful outcome.

Objective of the field visit (1)
After the field visit, the participants will:
- Feel refreshed and revived
- Understand interview, listening and discussion techniques as first steps towards effective communication.
- Have seen the practical reality of stakeholder analysis

Objective of the field visit
The participants will:
- Have had discussions with different stakeholders to identify communication issues and opportunities, from their point of view, for example in a N.P:
  - with a representative of Park Management
  - with a local fisher re nature conservation.
  - with a representative of the local Tourist Industry
- Have exchanged experiences in a plenary
Role Play Trinity Bay

Instruction for facilitators

Part A: Role Play In Groups

Explanation of the objectives and procedure of the role play

The idea is that we play the first meeting of the stakeholders. The facilitator plays the role of facilitator for this first meeting. The participants each play one of the six stakeholders in this case. In case the group is smaller than six, have at least someone play the TBDC, the farmers and the tourism operators. We play this case to experience the different interests people can have in case and what this means for open communication.

Getting into the case and the role

After the explanation you distribute the case and let the participants read the case. Than you discuss the case to make sure everybody understands the implications. It might be useful to draw up together a map of the area.

When the case is clear, you give the participants each a role, and let them read the description of the role. Give them the opportunity to clarify with you questions they might have after reading the role.

Starting the role play

Before starting you explain that you can stop the role-play at any moment you think is necessary and that your role in the play is that of the facilitator of the meeting. You start the role play with a text more or less as follows:

On behalf of the Countryside Stewardship Exchange 1 welcome you to this first meeting to discuss the future of the Trinity Bay area. We particularly are very grateful that you have been willing to find the time to come to this meeting. And as everybody must have a very busy schedule, it only means that we all seem to be convinced that the issue we are here for is of real great importance.

My name is ... and I am asked by the Countryside Stewardship Exchange to facilitate this first meeting. Is that all right with you?

OK. To start with I think it is important that we introduce ourselves first. Could every one tell us his or her name, which organisation or interest group he or she represents and what he or she expects from this series of meetings?

After this inventory, you summarise as the facilitator and make a first conclusion. Then you can explain that these meetings are aimed to find common ground for a future development of the area in a way that every stakeholder feels optimally satisfied. That this is a process of getting to know each other as people, and by negotiating in a special way. That this will take time.

Than you can continue to ask each: 'What do you see as the main challenge for a sustainable future for the Trinity Bay area?'
Changing roles

After this inventory you can freeze the role play. And ask the participants how it felt to play this role (what went well, what was difficult). Then you ask them to change roles. And you continue the meeting by asking the following rounds of questions:

- What questions do you have for the other participants regarding their definition of the main challenges?
- What does sustainable development in the Trinity Bay area mean for you?
- Which vision do stakeholders have for the future of Trinity Bay?

Evaluation and reporting

Then you can freeze the role play again and explore (by asking open questions) with the group in what respects they understand that stakeholders are people. That as people, stakeholders have interests. And that to find win-win situations all communication in this stage should be directed to open people up to each other, get a dialogue started, prevent hidden agenda's, explore common ground, explore obstacles etc. Then ask one to report to the plenary the group's findings.
Part B: Role Play In Plenary

Rationale
The idea is that we play again the first meeting of the stakeholders in the same case of the Trinity Bay area. This time the game will be played without the help of an outside facilitator. Six people are asked to play the different stakeholders at their first meeting. They will sit in the middle around a table. The group sits around them and observes. The facilitator can freeze the play from time to time and can ask some one from the outer circle to change places with someone from the table with stakeholders.

Objectives
The objective of this play is to see the importance of a facilitator for an open communication process. And to understand his role to make sure the right steps are taken: convening, understanding each others agenda's, setting a common agenda, exploring and defining issues for interactive policymaking, exploring and defining areas where win-win situations might be found, exploring the procedures to get there.

Results
What participants might experience is the attraction to jump too fast to negotiating the contents of the issues and the plenary discussions during freezing the play or afterwards might clarify the various communication steps and the need for an impartial facilitator.
ROLE PLAY TRINITY BAY

The issue
The sustainable development of Trinity Bay for the benefit and well being of present and future generations.

The background
The Trinity Bay area has a rich natural and cultural history. The Bay area includes the estuary and the Trinity watershed. The name Trinity was derived from the three sub-watersheds. There are three larger towns in the Bay. The three towns collaborate their economic development efforts through the Trinity Bay Development Corporation (TBDC). A highway serves as the main artery between Trinity Bay and the outside world. The highway also cuts through Trinity National Park, which borders on the Trinity Bay Watershed. The area is rich in resources with a diversity of people, a diversity of culture, a diversity of livelihoods and a diversity of natural resources.

The current status
Local people and organisations are concerned with the increased number and seriousness of issues and conflicts over natural resources that have occurred over the past few years. In answer to this concern, the three town councils and the TBDC have given funds to a non-profit organisation, called The friends of Trinity Bay, to participate in a regional exchange.

The exchange team members have received background materials prepared by TBDC and have spent the last week visiting people and organisations trying to assess the diversity of interests and the range of views as to what the issues are and what should be done about them.

They have now set up first meeting of representatives of the different stakeholders to explore whether they can start a process of finding common grounds for deciding on the main issues of the future development of Trinity Bay.

In this role play, we are going to play this first meeting of stakeholders. In the next paragraphs, the different stakeholders will be described in more detail.
The stakeholders

1. The Trinity Bay Development Corporation (TBDC)

The TBDC are proud of their contribution to economic growth in key sectors. They provided food-processing jobs and increased the demand for the local crop (potatoes) by providing an interest free loan and by getting the towns to agree on tax breaks and subsidised water rates. These incentives resulted in the opening of a mega-potato-processing plant in the area.

- They also provided low interest loans, which enabled local landowners to purchase mechanical tree harvesters to assist with the clearing of forest for conversion to agricultural production.
- Future plans of TBDC include a dam on the Salmon River to meet the growing demands for water and the widening of the interstate highway to allow for more movement of people and products.

2. The Farmers

The farmers in Trinity Bay are experiencing relative prosperity. They are enjoying the high demand for potatoes, which was encouraged by the TBDC (see above). Many of the farms on prime agricultural land close to the towns have been sold to make way for construction of apartments and other developments.

Farmers are using their profits from the sol land to buy forested lands and woodlots and turn them over to agricultural production. Many are also using the profits from land sales and farming to give their children the education and resources to get a start in the outside world.

3. The Tourism Operators

The Tourism operators in the Trinity Bay area are doing well. They have been adopting new ‘eco-tourism’ based packages in order to capture a growing market. And they were successful. Bird watching, hiking and cycling is growing in popularity for both seasonal residents and tourists.

Restaurants are serving (and doing well!) the local speciality ‘Trinity Oysters,’ next to other specialities from grandmother’s kitchen. A growing number of hotels have discovered that guests like their primary environment care, including energy and water-saving measures, the minibus service and other measures which make that you do not have to use your own car. The Trinity National Park, the estuary and the sea offer more opportunities for further development of the eco-tourism packages.
4. The Trinity National Park

Trinity National Park is having a difficult time in fulfilling its resource conservation mission. Development pressures around the park, including the clear cutting of forest and the draining of wetlands for agricultural production, are impacting on many species and their habitat. The plans to further develop the Highway are also a threat. The park plans to introduce several new species recovery programs. It is proposed that these and other new programs will be funded by introducing users’ fees for beach access, using volunteers to replace paid summer students and by introducing a toll fee for motorists passing through the park on the highway.

5. The Oyster Fishermen

The Oyster Fishermen are having a difficult time. Their once productive growing areas of oysters are threatened by a variety of developments in the Bay area. The developments in agriculture are the cause for the increase of sediments from agricultural run off and for the masses of wastewater of the recently established potato processing plant. The urban development and the growing number of tourists are the cause for the increase of sewage treatment effluent. Combined these pollutants threaten the whole oyster industry. Many oyster farmers have already given up and gone to work in the potato plant. Others are hoping for better times and hang on.

6. The long term residents

Outside the tourist season the population of Trinity Bay area is 50% of what it is during the season. The long-term residents are those who stay behind after the tourists and the seasonal residents, who live in the new apartments and bungalows in the area, have left. They are concerned about the costs of living in the area. Taxes and water rates are going up, and the prices of goods and services are also getting higher. The municipalities and the business community seem to cater for the wealthy seasonal residents and tourists instead of the long-term residents. So many long term residents have to drive out the area to do their shopping. Long term residents point to the fact that the municipal councils are dominated by ‘come-from-away’ seasonal residents, as evidence that they are being forgotten. Similarly, the youth are concerned about access to the beaches. Private developments have left many with no other option but to drive to the National Park to gain access to beaches. In order to avoid low paying service jobs and the high cost of living in the area, most of the youth are leaving the area as soon as they graduate from high school.
Module 6:
Materials and Media
Module 6: Materials and media

I. Objectives
After this module, the participants will:
- be familiar with the different type of media and materials that can be used to reach different target groups
- understand the advantages and disadvantages of the different types of media and instruments
- have insight in the capacity or availability of the media in their respective countries
- understand which media and which instruments are most appropriate for a given situation and target group

II. Programme
1. Overview of the different type of media (channels)
2. Advantages and disadvantages of media and instruments

III. Working Methodology
This is not a module in the sense that it contains training elements. The purpose of this module is to provide reference material for communicators who want to assess which channel and which instrument is most suited for a given target group.

IV. Training Materials:
The attachment to this module can be printed and distributed as handouts. One set has been developed for the facilitators if the role play, the other set for the participants.
Attached to this module, one can find:

<table>
<thead>
<tr>
<th>Support materials</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Lists</td>
<td>4</td>
</tr>
<tr>
<td>Fact Sheets</td>
<td>-</td>
</tr>
<tr>
<td>Power Point Papers</td>
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</tr>
</tbody>
</table>
# Checklist for communication media and instruments

**Interpersonal media**

<table>
<thead>
<tr>
<th>Instruments</th>
<th>Advantages</th>
<th>Disadvantages</th>
<th>Points to remember</th>
<th>Regional Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public consultations and assemblies</td>
<td>Good venue for two-way communication. Reaches large and well-defined groups. Opportunity for stakeholders to voice opinions and ask questions.</td>
<td>Often too large-scale to reach common agreements. People sometimes afraid to speak in public. Time limitations and difficult when atmosphere is hostile.</td>
<td>Often required by law with the purpose to involve stakeholders in planning process.</td>
<td></td>
</tr>
<tr>
<td>Meetings/ discussions</td>
<td>Good venue for two-way communication, and more suitable to reach consensus because of smaller groups.</td>
<td>Needs skilled facilitators or discussion leaders.</td>
<td>This is an informal process to explore a specific issue, involving different stakeholders on a basis of equality.</td>
<td></td>
</tr>
<tr>
<td>Focus group discussions</td>
<td>Good way to gain insight in issues and perceptions, and to stimulate involvement and active participation.</td>
<td>Careful preparation needed to guide the participants through the process.</td>
<td>Small group of stakeholders or citizens that can be used to assess reactions to plans. It has no formal advisory role.</td>
<td></td>
</tr>
<tr>
<td>Workshops</td>
<td>Good venue for two-way communication, to gain insight in issues and ideas, and to stimulate knowledge &amp; skills development.</td>
<td>Good preparation and facilitation needed. Transparency needed throughout about purpose and actions with outcome.</td>
<td>This is an active instrument, which needs true participation of all involved.</td>
<td></td>
</tr>
<tr>
<td>Cross visits</td>
<td>Often very effective eye-opener making people aware of scale of issues, perceptions and options for solutions.</td>
<td>Can be expensive.</td>
<td>Visit to other site with similar management or communication issues. Very effective for wetland managers, intensive user groups</td>
<td></td>
</tr>
<tr>
<td>Excursions &amp; site visits</td>
<td>Visit to the site under discussion.</td>
<td>Can be, but not necessarily, expensive.</td>
<td>Local youth, school classes, citizens</td>
<td></td>
</tr>
</tbody>
</table>
### Environmental games and competitions

Informal, playful, participatory: a very effective tool in raising understanding, awareness, support, although time consuming.

If done by community groups cheap, otherwise can be expensive. Needs considerable guidance.

### Environmental theatre

Very effective to obtain in-depth knowledge about issues and perceptions among different stakeholders.

Very time-consuming and costly.

Designing and conducting interviews is specialised task.

### Personal interviews

Informal, direct and two-way contact, making it easily accessible to many people.

Can be costly and time-consuming.

Information numbers that people can ring to get information or give feedback. Service has to be made known.

### Telephone

Informal, direct and two-way contact, making it easily accessible to many people.

Can be costly and time-consuming.

Information numbers that people can ring to get information or give feedback. Service has to be made known.

## Printed media

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Letters</td>
<td>Personal mode of communication, relatively high chance of being noticed and read by intended target group (when personalised); mail-merge software makes it easier to send personalised letters to larger groups.</td>
<td>Unsuitable for very large groups.</td>
<td>Requires up to date database with names, addresses, etcetera.</td>
<td></td>
</tr>
<tr>
<td>Annual report</td>
<td>Good opportunity to give information about organisation's operations.</td>
<td>Can be quite costly and time consuming to produce and distribute; often lost in the flood of annual reports that is sent out every year; little chance of feedback</td>
<td>Often law requires an annual report. If you are making one anyway, it might as well be good!</td>
<td></td>
</tr>
</tbody>
</table>
### Visual media

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Visitor centre</td>
<td>Attractive way to present information; if staff available direct feedback opportunity; chance to appeal to all senses: strong impact.</td>
<td>Will not reach target groups who are not interested. Costly to build/rent and maintain.</td>
<td>How to attract the right target groups, how to ensure financial continuity.</td>
<td></td>
</tr>
<tr>
<td>Displays/Exhibitions/Posters</td>
<td>Attractive way to present information, if staff is present there is a direct feedback opportunity.</td>
<td>Can be costly.</td>
<td>Go for lightweight, portable and easily changeable systems; Don’t present too much information.</td>
<td></td>
</tr>
<tr>
<td>Slides</td>
<td>Attractive, eye catching, potential for strong impact. Useful as a support for other communication activities. Direct feedback often possible.</td>
<td>Needs special equipment and darkened room, slightly tricky in use.</td>
<td>Always test equipment beforehand.</td>
<td></td>
</tr>
</tbody>
</table>
### Overhead sheets
- **Cheap and easy to make, effective to support speeches.**
- Needs special equipment, tendency to put too much information on one slide.
- Aim for no more than 5 lines with 5 words.

### Film/video
- Suitable to address groups of various sizes. Easy to transport and to reproduce. Different options for distribution.
- Expensive to produce, needs professional skills, no feedback possible, difficult to change.

### Digital media

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Websites</td>
<td>Attractive way to present high variety of information, feedback and interaction possible, relatively easy to update, insight in number of users, potential to reach high number of people.</td>
<td>Not accessible for everyone, requires technical expertise</td>
<td>How to attract target groups to the website? Ensure linkages with popular target group sites and ensure high ranking with search engines.</td>
<td></td>
</tr>
<tr>
<td>CD Roms</td>
<td>Suitable medium to present complex and high quantity of information, relatively cheap to reproduce, easy to distribute.</td>
<td>Requires special equipment to use, requires technical expertise to develop.</td>
<td>Check CD Rom use in target group first.</td>
<td></td>
</tr>
<tr>
<td>E-mail (- newsletter)</td>
<td>Effective medium to approach small and large number of people, cheap, fast, direct, possibility for feedback.</td>
<td>Difficult to stand out in large number of e-mails sent each day.</td>
<td>Necessary to attract attention right away. Be direct, avoid long messages.</td>
<td></td>
</tr>
<tr>
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<tr>
<td>Radio broadcasts</td>
<td>High local interest; accessible for large audience, audience can be targeted, low production costs.</td>
<td>Contact does not mean communication, lacks personal appeal, scheduling can be problematic, no control over final message (dependant on editors and journalists).</td>
<td>Keep an updated list of media addresses and contact persons, follow up phone call increases chances of publication, maintain good relations with important editors.</td>
<td></td>
</tr>
<tr>
<td>TV broadcasts</td>
<td>Potential for high impact, accessible for large audience, audience can be targeted.</td>
<td>With increasing number of channels more difficult to reach large audience, no control over final message (dependant on editors and journalists).</td>
<td>Keep an updated list of media addresses and contact persons, follow up phone call increases chances of publication, maintain good relations with important editors.</td>
<td></td>
</tr>
<tr>
<td>Newspaper articles</td>
<td>Usually wide circulation; information can be distributed quickly.</td>
<td>No control over final message (dependant on editors and journalists).</td>
<td>Keep an updated list of media addresses and contact persons, follow up phone call increases chances of publication, maintain good relations with important editors.</td>
<td></td>
</tr>
<tr>
<td>Press conference</td>
<td>Chance to deliver more complex information to media; has opportunity for feedback.</td>
<td>Staff needs to be trained in media contact.</td>
<td>Requires careful preparation.</td>
<td></td>
</tr>
<tr>
<td>Press releases</td>
<td>Cheap way to draw attention of media to newsworthy events; suitable for fairly straightforward issues; can be produced on short term.</td>
<td>Media receive large numbers of press releases; difficult to attract attention, requires writing skills, no direct feedback from journalists.</td>
<td>Keep an updated list of media addresses and contact persons, follow up phone call increases chances of publication, maintain good relations with important editors.</td>
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</table>
Checklist Mass Media: how to approach them

How to get mass media coverage

Getting the mass media interested in biodiversity conservation is not something that you will be able to do in a day or even a month. You will have to invest a lot of time and effort into exploring the different newspapers, journals, magazines, radio and TV channels, which might be interested in your work. It will take even more time to establish a good personal relationship with reporters and journalists. The following suggestions may help you but in the end it will all depend on whether journalists will think that you have something to say that is interesting enough.

1. Be prepared. Explore the market and make sure that you have the necessary information available before you really need to contact the press. Find out which media cover environmental issues and which journalists report on them (this can be done by carefully reading papers and magazines, and watching radio and t.v. programmes). Assess what kind of issues they cover. Make a database (or a list) of names, addresses, telephone numbers, fax numbers etc. of the editorial offices and of individual journalists. Do not forget about the freelance journalists. They are not attached to any specific newspaper or programme and they are always on the lookout for a story to sell. Don’t forget Internet - don't forget radio. Ask for help if you can’t find this kind of information by yourself. Other organisations may have more press contacts than you.

2. When you think of contacting the media, step back and decide for yourself what you want to achieve. Are there particular groups you want to reach (farmers, children, landowners in a certain region, politicians)? Can you reach them in a more direct way? What is the message you want to give? Decide whether a mass media approach is most suitable. If it is, decide which media or journalists will be most interested in you and your news, and which media are most popular with the groups you want to reach.

3. Do you have News? Journalists want news of some sort. Be aware that what is important to you may not be the least bit interesting to a journalist. Be self -critical. Is your news really News? The publication of a research report may be a big event to you, but unless it contains shocking new discoveries the media will not be interested. Don’t bore journalists with an endless stream of phone calls and press releases about unimportant issues; you will only ruin your good name and credibility. Never complain to journalists if they don’t pay attention to you. What actually is ‘news’ depends on the journalist. A journalist specialised in environmental issues who regularly contributes to the science section of a major national newspaper will have another definition of news than a reporter working for the breakfast show on a local radio station.

4. To a certain extent you can make something News. A research report can become News if you present it to a local politician who is then photographed feeding a rare example of biodiversity. Invite celebrities to your events - the press will follow.

5. Try to establish good personal contacts with journalists. Help them even if there is nothing in it for you, for example when they call you to ask for the address of another organisation. Be nice to them - help them do their work - but don’t be humble: remember that in the end they need you as much as you need them.

6. Prepare for interviews - carefully think about what you want to say. Practice with colleagues or family. Tape it and listen to it to improve your performance. Forget you are a scientist or a policy maker: speak understandably, avoid jargon, and try to think as a member of the audience that you want to reach.
7. Learn to write good press releases. A good press release should be no longer that 2 pages of A4 typed with 1.5-line spacing. It should have a clear and interesting headline. In the first paragraph of the press release you should answer the questions who, what, where, why, when and how. After reading it, a journalist should know if this press release is interesting for him or not. In the following paragraphs you give the full story. Smaller local newspapers appreciate ready to print articles. Prepare these if necessary or write your press release in such a way that it can be used as an article. Again: avoid jargon, think like a member of the target group. If you have good illustrations (photographs or video) that the press may use, mention that as a footnote in the press release. Also mention in a footnote whom the press can contact for more information. Make sure that this person is available and can be easily reached by phone.

8. Never leave media contacts to the last minute - start preparing in time. Send out invitations to media events in time so that reporters can plan their work.

9. Remember that journalists like scoops - to be the only journalist who has a story. If you have established really good relations with a journalist, you can give him or her an exclusive story, but be aware of the effect it may have on your relationship with other journalists.

10. Don’t ever lie to the press, don’t exaggerate or make promises you can’t keep. They will never believe you again.

Even if you follow all these rules, trying to get into the mass media may be very frustrating when these damned journalists just won’t do as you tell them. Remember that good journalists never do as you tell them.
Checklist for developing a brochure

- A thorough analysis of the issue is needed to determine if a brochure is an effective instrument for the problem at hand.
- A brochure should be considered only one element of a communication strategy. It is important to think about the role of the brochure in the total communication process.
- Brochures should be attuned to the other communication means used, like information meetings, face to face communication with the target group, press releases about the project, etcetera.
- It is of essential importance that the brochure is tailored to the target group. The message used, the language and the design should be based on the preferences and culture of the target group.
- Collect brochures and leaflets on similar subjects. It will help you to form an idea about the concept so you can brief the designer.
- A plan for the development and distribution of the brochure is needed.
- Briefings for copywriters, designers and printers should be both oral and written.
- Determine the budget beforehand. Design possibilities are strongly determined by budget.
- Remember that the design and tone of voice should be based on the target of the communication, an understanding of the target group and the language that appeals to them.
- Form an idea about the type of paper, colour, use of pictures and illustrations, size and number of pages, stapling/folding, etcetera.
- Pre-test a draft version of the brochure to make sure the communication has the desired effect.
Checklist Organizing an information meeting

Organizing an information meeting

A thorough analysis of the issue is needed to determine if an information meeting is an effective instrument for the problem at hand.

- An information meeting should be considered only one element of a communication strategy. It is important to think about the process of which information meetings are an element: which steps are taken as preparation and which steps are taken as a follow up.

- Information meetings should be attuned to the other communication means used, like written information to prepare the meeting, brochures or leaflets about the matter concerned, the written report of the meeting, press releases about the project, etcetera.

- Start a task force with those who will be involved in organising the meeting.

- Make a scenario for the preparations, the meeting itself and the follow up (activities, planning and division of tasks). Discuss the scenario with your task force.

- Make appointments for the location, catering and the media that must be present (like a microphone, overhead projector, flip over, slide projector).

- Make appointments with the chairman and the spokesman. Give a briefing on the contents of their contribution.

- Decide on the media that must be developed like slides, sheets, a brochure etcetera. Make a work plan for the development of these media and give briefings to those involved.

- Make a plan for your press contacts.

- Send invitations to your audience and press.

- Check equipment and catering on the day.

- Keep track of messages in the media after the meeting.

- Decide which steps should be taken as a follow up.

- Send a report.
Module 7:
Monitoring and Evaluation
Module 7: Monitoring and Evaluation

I. Objectives

After this module, the participants will:
Understand the importance and the functions of Monitoring & Evaluation (M&E)
Be familiar with different types of M&E

II. Programme

1. Introduction to M& E instruments
2. Workshop Evaluation

III. Working Methodology

1. Introduction to M& E instruments

Duration : 30 min
Role of other facilitators:
Procedure:
- PowerPoint presentation to show and discuss the importance and the functions of Monitoring & Evaluation (M&E)
- Present different types of M&E
- Ask group for examples that they have worked with

2. Workshop Evaluation

Duration : 30 min
Role of other facilitators: distribution questionnaires, flipcharts
Procedure:
- This last module will be an interactive one: by applying the different instruments of M&E we have just seen in the PowerPoint presentation to the current workshop itself
- The participants will fill and submit a workshop evaluation form
- The workshop will be evaluated qualitatively through a guided group discussion
- The results of the evaluation will be analysed by the facilitator and made available to all participants after the training
IV. Training materials

Some PowerPoint slides can be found that can be used for the presentation. Furthermore, an example of a workshop evaluation questionnaire has been attached. This example can freely be adjusted and used for other workshops or projects. Lastly, a checklist and two fact sheets on M&E have been attached for reference purposes.

At the back of this module, one will find:

<table>
<thead>
<tr>
<th>Support materials</th>
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<td>Check Lists</td>
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<td>Fact Sheets</td>
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<tr>
<td>Power Point Papers</td>
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</table>
Example: Workshop Evaluation sheet

1 = not effective or not good  
2 = average  
3 = effective or good  
4 = very effective or very good

<table>
<thead>
<tr>
<th>1. The overall programme</th>
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<td>Interesting, appealing</td>
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<td>Adaptable</td>
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<td>Relevance for your organisation</td>
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Remarks:

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<td>1: introduction &amp; assessment</td>
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<td>2. Use of information sheet</td>
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<td>3. expectations</td>
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<td>4. Inventory of and agreement on basic concepts to be discussed in the manual</td>
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<td>5. Workshop structure and division of tasks, ‘writeshops’ and presentation schemes</td>
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<tr>
<td>6. How useful is the module to you to be used in the final manual?</td>
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2: module - writing sessions (1, 2)

a. The briefings
b. The group work
c. The presentations
d. The evaluations
e. The output
f. How useful is the module to you to be used in the final manual?

3: module - writing & training (3, 5)

a. The training
b. The group work
c. The presentations
d. The evaluations
e. The output
f. How useful is the module for the manual?

4: training module 6

a. The training: interest
b. The training: inter-activity
c. The PowerPoint slides
d. The explanations
e. The exercise
f. The group work
g. The presentations
h. The evaluations
i. The time management
j. How useful is the module to you to be used in the final manual?
### 3. The trainer

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<td>Cultural sensitivity</td>
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<td>Team work</td>
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<td>Regional representation</td>
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<td>Attitude (smile!)</td>
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<td>Team work</td>
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### 5. The time

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<td>Number of days</td>
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<td>Hours per day</td>
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<td>Work in weekend</td>
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<td>Work in evenings</td>
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<td>Length per module</td>
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<td>Breaks</td>
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<td>Time keeping</td>
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### 6. The venue

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<td>Equipment</td>
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<td>Drinks &amp; snacks</td>
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<td>Accommodation (your room)</td>
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<td>Food</td>
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<td>Location in city</td>
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### 7. The organisation

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<td>Invitations in time</td>
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<td>Briefing</td>
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<td>Timing</td>
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Describe in short what you think of the training:
Checklist monitoring & evaluation of management effectiveness

- M&E should aim to be participatory at all stages of the process and should seek the involvement of all relevant organisations and individuals that may have a stake in the management or use of the site
- M&E should be based upon a well-founded, transparent and comprehensible system. The findings should be readily accessible to all interested parties in a way that is appropriate to their needs
- The objectives and criteria for judging project and management performance must be clearly defined and understood by the managers and assessors
- The indicators for judging project and management performance must be defined at the design stage of the project. These can range from context, design to inputs, processes, outputs and outcomes.
- M&E should focus on the most important issues that potentially affect the achievements of the management objectives, and should therefore include threats and opportunities
- Performance indicators should relate to social, environmental and management issues
- Limitations of the evaluation should be clearly identified in the assessment report
- The M&E system should be capable of showing change over time through periodic assessments (monitoring)
- In the report, strengths and weaknesses should be identified and issues should be identified as being inside or outside the control of the manager
- The M&E should allow prioritisation of the conservation or communication effort
- Clear recommendations for improving management performance should be included in all assessments. Management processes should ensure that the findings and recommendations of evaluation feed back into ongoing decision making so as to improve performance
- The methodology and approach of the M&E should be progressively verified and refined as necessary
- The assessments should be based on sound and appropriate environmental and social data
- M&E is likely to include both qualitative and quantitative information that should be supported by measurement or other evidence

Adapted from: Evaluating Effectiveness (IUCN 2000)
### Framework for evaluating management effectiveness

<table>
<thead>
<tr>
<th>Elements of evaluation</th>
<th>Context</th>
<th>Planning</th>
<th>Input</th>
<th>Process</th>
<th>Output</th>
<th>Outcome</th>
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<tbody>
<tr>
<td>Explanation</td>
<td>Where are we now?</td>
<td>Where do we want to be and how are we going to get there?</td>
<td>What do we need?</td>
<td>How do we go about it?</td>
<td>What did we do and what products or services were produced?</td>
<td>What did we achieve?</td>
</tr>
<tr>
<td></td>
<td>Assessment of importance, threats and policy environment</td>
<td>Assessment of project design and planning</td>
<td>Assessment of resources needed to carry out management</td>
<td>Assessment of the way in which management is conducted</td>
<td>Assessment of the implementation of management programmes and actions; delivery of products and services</td>
<td>Assessment of the outcomes and the extent to which they achieved objectives</td>
</tr>
<tr>
<td>Criteria that are assessed</td>
<td>Significance</td>
<td>Legislation &amp; policy design and planning</td>
<td>Resources of agency</td>
<td>Suitability of management processes</td>
<td>Result of management actions</td>
<td>Impacts: effects of management in relation to objectives</td>
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<td>Threats</td>
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<td>Resources of site partners</td>
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<td>Services and products</td>
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<td>Vulnerability</td>
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<td>National context</td>
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<td>Focus of evaluation</td>
<td>Status</td>
<td>Appropriateness</td>
<td>Resources</td>
<td>Efficiency Appropriateness</td>
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Adapted from: Evaluating Effectiveness (IUCN 2000)
Fact sheet Monitoring & Evaluation

A Monitoring & Evaluation (M&E) scheme is used to determine the impact of the interventions of the project: what was the effect of the communication effort? Have the communication objectives been achieved?

An evaluation is a comparison: what has changed compared to before the intervention took place? Was this change according to the objectives set at the beginning?

To provide the opportunity to compare later on, proper M&E requires a situation analysis at the onset of the project in which current status, threats and opportunities are assessed. The situation analysis also helps to define objectives and to set criteria against which performance is to be monitored and evaluated.

What type of M&E is needed? Establishing the purpose of the monitoring and evaluation is an important first step, together with how much time and effort can be committed to it. How and when to use evaluation should be decided during the design stage of the project.

The selection of indicators to be monitored is critical. For the purpose of comparison, these criteria must be the same at the beginning and the end of the evaluation period. It is therefore wise to plan criteria and procedures during the project design phase.

However, the system should also be capable of showing change over time through periodic assessments. At these monitoring moments, indicators may be added to suit local or site specific circumstances.

M&E is usually not intended as a sequential process, but as a progressive cycle, with shifts in focus of the evaluation depending on the phase of the project. M&E can effectively be applied at different levels: during situation analysis and planning phase, during implementation of the project, and/or during the outcome or concluding phase.

During situation analysis, the context of the project is assessed and criteria for M&E are set. During project implementation, the indicators are used to monitor progress, outputs and outcome of management. In the final analysis, the evaluation of the outcome of the project is the true test of how effectively the project was managed.

Too often, valuable evaluation results are kept in a drawer because they seem threatening to policy makers and campaign/communication managers. The results of the evaluation should be communicated not only to your own project/programme staff, but also to the policy makers involved.
Module 7: Monitoring and Evaluation

Monitoring & Evaluation

Module 7

M & E
- Determine impact & effectiveness
- Clearly defined objectives
- A comparison
- Selected indicators
- Progressive, cyclic
- Transparent, participatory
- Reporting on strengths and weaknesses

Module 7

M&E approaches
- Quantitative
- Qualitative
- Anonymous
- Known identity
- Structured M&E questionnaires
- Guided discussions

Module 7

Quantitative
- Structured M&E questionnaires
- Rating the different components of the workshop or project
- Anonymous: can give people more freedom to speak honestly
Module 7: Monitoring and Evaluation

Qualitative (1)

- Interviews
- Guided group discussions
- Impact measurements

Module 7: Monitoring and Evaluation

Qualitative M&E

Guided group discussion:
- What have you learned?
- What still needs to be improved?
- Was it relevant for our organisation? Why?
- Did the training answer your expectations?
- Were the objectives met?

Module 7: Monitoring and Evaluation

M&E results

- Don't hide weak results
- Turn threats into opportunities
- Use weak results to improve performance (is purpose of M&E)
- Communicate results widely
Module 8: Developing a communication strategy: 10 steps
Module 8:
Developing a Communication Strategy: 4 phases, 10 steps

I. Objectives
After this module, the participants will
- Understand that planning communication needs decisions about target groups, objectives, messages, media and organisation/budgets etc.
- Understand that planning is a prerequisite for effective and efficient use of resources for communication
- Know how to prepare and present a communication strategy in 10 steps, 4 phases
- Know how to prepare a strategy that is S.M.A.R.T.E., and ready for implementation

II. Programme
1. Presentation: phases 1 & 2: Analysis & The Strategy
2. Exercise: Preparing a communication strategy (part 1)
3. Presentation: Phase 3 & 4: Planning & Monitoring & Evaluation
4. Exercise: Preparing a communication strategy (part 2)

III. Working Methodology
1. Presentation: phases 1 & 2: Analysis & The Strategy
   Duration: 1 hour
   Role of other facilitators: no specific role
   Procedure:
   - Hand out the ‘Arrow’: the different phases in communication planning. Briefly discuss the different phases (1) analysis, (2) strategy formulation, (3) planning and (4) Monitoring & Evaluation)
   - Explain the mechanisms of this module: after a short presentation of the different phases, the participants will apply the lessons learned by preparing their own communication strategy. This will be an exercise in strategic planning, in working as a group and in time management. The exercise will be cut in two parts.
   - Presentation (using PowerPoint slides) of phases 1 and 2. Link as much as possible to issues discussed in previous modules, and invite participants to fill in parts. Especially the analysis part and objectives will have been discussed previously. Give more attention to steps 5 and 6: determination of message, channels and means. Use flipchart to illustrate your presentation with key words, or drawings.

2. Exercise: Preparing a communication strategy (part 1)
   Duration: 2 hours
   Role of other facilitators: assess group work
   Procedure:
   - The participants will work in the same groups in which they started defining a conservation issue in module 3. The groups will continue to work on the same issue that was selected then. Let the plenary give a recap: what were the issues you formulated in module 3? What was the conservation objective? What were the communication objectives? (10 min)
   - In the following session in small groups each of these elements will be further discussed and applied to the real-life working example. During a very brief plenary session, the main elements of the communication strategy will be presented. Five sheets with the main elements are presented and discussed. Explain the exercise (10 min).
The groups are requested to prepare five transparencies (50 min):

**Sheet 1**: The issue (conservation issue & conservation objective)
**Sheet 2**: the actors and stakeholders
**Sheet 3**: the communication objectives
**Sheet 4**: the message
**Sheet 5**: the media

*Each sheet can contain maximum 4-5 bullet points, which can be used to describe the element of the communication activity.*

*The groups can use 10 min. to prepare each sheet. Timekeeping will be very strict. This is an exercise in strategy development, but also in group work and time management!*

**Note to the facilitators:**
The facilitators should ensure that the group does not use an example, which is too complex, with too many different stakeholders. Therefore each group should consult the facilitators after preparing sheets 1 and 2, to see if they are on the right track (10 min).

**Plenary feedback (50 min.)**
The results from each working group will be briefly presented (10 min each) and discussed (15 minutes each). The groups will evaluate each other. Revisions will be incorporated in the sheets for further use in next exercise.

3. **Presentation: Phase 3 & 4: Planning & Monitoring & Evaluation**

**Duration:** 1 hour

**Role of other facilitators:** no specific role

**Procedure:**
- This part of the module is again a PowerPoint presentation. It is a follow up on the first presentation. Recap to the group: you have now defined the conservation issue, you have set conservation objectives, and you have determined how communication can play a role in achieving these conservation objectives. After that, you have set your verifiable communication objectives, you have further analysed the situation and the stakeholders, so that you have been able to determine the which groups you want to target, the messages for each target group, and which channels and instruments to use to communicate these messages to the target groups. Now you are ready to actually plan the implementation of this communication. In this presentation, we will see how to plan budget, people and time available. How to balance between quality and these limiting factors. And we will discuss how we can control quality, monitor progress, and assess whether we are on track towards meeting our objectives, or whether we need adjustments in our approach or planning: Phase 4: Monitoring & Evaluation. After these steps, your communication strategy will be ready for execution!
- Invite group discussion: how to carefully balance time, budget and quality by strict planning, while at the same time remain flexible enough to respond to necessary adjustments or deviations? This is our challenge as communicators. It requires proper preparation and analysis. If your preparation is good, you will be able and confident enough to propose deviations.
4. **Exercise: Preparing a communication strategy (part 2)**

**Duration**: 2 hours  
**Role of other facilitators**: no specific role  
**Procedure**:  
- This is part 2 of the exercise in which the groups prepare a communication strategy. The groups will be the same, and will continue to work on the same cases.  
- The groups will again prepare 5 transparencies, presenting:  
  - *The 5 (revised) results of part 1*  
  - *The budget*  
  - *The organisation*  
  - *The planning*  
  - *The Monitoring & Evaluation approach*  
  - *Again, each sheet may have a maximum of 5 bullet points each and the groups will have 10 min. per transparency.*  
- A plenary presentation (10 min) and evaluation/discussion (15 min) will follow  
- The plenary will decide in the end: which proposed communication strategy is ready for implementation? Which is best in terms of accountability (S.M.A.R.T.E.)? If you would be the donor agency, with funds to finance just one project, which one would be the best investment? (20 min).

**IV Support Materials**

During the presentations, a flipchart and coloured markers will be needed. To carry out the exercises, one needs transparency sheets, and coloured markers, to write on them.  
**Attached to this module, one will find:**

<table>
<thead>
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<th>Support materials</th>
<th>No.</th>
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<tr>
<td>Fact Sheets</td>
<td>1</td>
</tr>
<tr>
<td>Power Point Papers</td>
<td>1</td>
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</table>
Checklist Communication planning

**Communication planning**

- Set organisational goals
- Define what goals you want to communicate
- Carry out situation analysis
- Identify your significant stakeholders and target groups
- Define objectives for each target group
- Design different approaches for different audiences: message and media strategies
- Prepare program evaluation method
- Prepare implementation plan (assign responsibilities, do schedule & budget, design feedback and program adjustment)
- Implement your plan
- Measure the effectiveness of your communication
- Evaluate results
- Store and disseminate lessons learned so they can be used at the right next occasion

A Continuum in planning:

- Target group
- Objective
- Message

A balance in planning:

- Time
- Budget
- Quality
Checklist Logical Framework

A logical framework is a tool that helps managers in the planning of projects and activities. It is useful to gain insight in the project by defining verifiable indicators, which measure failure or success and as such help to monitor and evaluate the project effectively. It is very useful when planning communication intervention, but is also widely used for more technical nature management projects. A plan is nothing, planning is everything. A logical framework is a tool. It should not dominate the planning. Planners should be prepared to modify the intervention logic as various needs and ideas arise during the participatory planning process.

The framework consists of a matrix. This annex explains the matrix and gives definitions of terms used. Before doing so, the different phases in the planning process are being discussed.

Phases Logical Framework Approach

<table>
<thead>
<tr>
<th>ANALYSIS PHASE</th>
<th>PLANNING PHASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Problem analysis Identifying key problems, constraints and opportunities; determining cause and effect relationships</td>
<td>4. Logframe Defining the project structure, testing its internal logic and formulating objectives in measurable terms</td>
</tr>
<tr>
<td>2. Analysis of objectives Developing objectives from the identified problems; identifying means to end the cause and effect relationships</td>
<td>5. Activity scheduling Determining the sequence of activities; estimating duration, setting milestones and assigning responsibility</td>
</tr>
<tr>
<td>3. Strategy analysis Identifying the different strategies to achieve the objectives; determining the overall objectives and project purpose</td>
<td>6. Input and cost scheduling From the activity schedule, developing input schedules and a budget</td>
</tr>
</tbody>
</table>

Implementation & Evaluation Phase

In addition to its role during program and project preparation, the logical framework approach is also a key management tool during implementation and evaluation. It provides the basis for the preparation of action plans and the development of a monitoring system during the implementation, as well as a framework for evaluation.
Logical Framework matrix

The matrix that needs to be filled in when using the logical framework approach is designed as follows. Below the table, definitions of the terms used are given.

<table>
<thead>
<tr>
<th>Overall Objectives</th>
<th>Objectively verifiable indicators</th>
<th>Sources of verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Purpose</td>
<td>Objectively verifiable indicators</td>
<td>Sources of verification Assumptions</td>
</tr>
<tr>
<td>Results or Outputs</td>
<td>Objectively verifiable indicators</td>
<td>Sources of verification Assumptions</td>
</tr>
<tr>
<td>Activities</td>
<td>Means</td>
<td>Costs Assumptions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pre-conditions</td>
</tr>
</tbody>
</table>

Overall Objectives:
The long term goals of the organization, of sustainable development, of biodiversity conservation, environmental protection etc. to which the project makes a contribution. Several projects may contribute to the same overall objective. Its attainment often takes longer than a single project’s lifetime.

Project Purpose:
The specific objective of the project, i.e. the improved situation from the point of view of the beneficiaries; or the answer to the core problem.

Results or Outputs:
The results or outputs are derived from the objectives, which together lead to the project purpose. Results should be stated as an improved state of affairs such as adequate legal framework exists or “peasants are planting trees”. They may be for example: services and infrastructure delivered by the project and used by the beneficiaries. Results are not only physical outputs but a start to enjoyment of sustainable benefits.

Activities:
Activities are specific tasks derived from the lower level objectives which combined produce the results. When the activities are carried out the means and inputs are transformed into results that together will achieve the project purpose.

Means:
The means are human resources, equipments and material inputs require to carry out planned activities and manage the project. Means are first defined in general terms, and then later detailed in terms of quantity, quality and finance.

Objectively verifiable Indicators:
Measurable indicators that will show whether or not objectives have been achieved at each level of the logframe hierarchy. These indicators provide an important basis for the design of an appropriate monitoring system.
**Milestones:**
A type of objectively verifiable indicators providing indicators for short-term objectives, which facilitate the measurement of achievements throughout the project rather than just at the end. They also indicate times when decision can or should be made.

**Means of verification:**
The means by which the indicators or milestones will be recorded and made available to project management or those evaluating project performance.

**Risks, constraints and assumptions:**
External factors which could affect the progress or success of the project, but over which the project manager has no direct control.

**Pre-conditions:**
Preconditions (if any) attached to the provision of aid, which must be met before the project can commence.

**Factors ensuring sustainability:**
Factors that will determine whether project benefits continue after completion of the project.
## Checklist Phases Logical Framework

<table>
<thead>
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<th>PLANNING PHASE</th>
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</thead>
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### IMPLEMENTATION & EVALUATION PHASE

In addition to its role during program and project preparation, the logical framework approach is also a key management tool during implementation and evaluation. It provides the basis for the preparation of action plans and the development of a monitoring system during the implementation, as well as a framework for evaluation.
Checklist Log Frame - external factors

From: Hect Consultancy

Is the external factor important?

YES

Will it be realised?

Almost certainly

Do not include in the logframe

NO

Likely

Include as an assumption

Unlikely

Is it possible to redesign the project in order to influence the external factor?

YES

Redesign the project: add activities or results; or reformulate project purpose.

NO

The project is not technically feasible. Must be transformed into an acceptable assumption.
# Checklist Project Management Phases

## Phases in managing a project

<table>
<thead>
<tr>
<th>Stage</th>
<th>Core issue</th>
<th>Main Questions to answer</th>
<th>Final Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Execution</td>
<td>Realisation</td>
<td>What is the main policy? What did we agree on in the project document?</td>
<td>TMQ? Is it feasible? If not adapt the project according to TMQ.</td>
</tr>
<tr>
<td>6. Follow-up</td>
<td>Delivery and after-care</td>
<td>How can we ensure that everything is running without us? How can we ensure others know about our success?</td>
<td>TMQ? Who to involve? Who to inform? How can we ensure sustainable customer satisfaction?</td>
</tr>
</tbody>
</table>

*TMQ: Time, Money, Quality*
Checklist project document

A project plan should be well documented. A copy of the project document – in some cases without the budget - should be made available to all key players who were involved in the process of creating it. A project document may have the following sections:

- Summary of the project description
- Rationale, background or problems to be addressed
- Overall Objectives
- Project purpose and desired results
- Approach or strategy to reach the results
- Project team and data team members
- Detailed scope including scope from the project contract
- Tasks and responsibilities (list person responsible for each task)
- Schedule
- Budget
- Sample of cost reporting sheets with related explanation of content
- Invoicing procedures
- Reporting procedures
- Procedures for changes in scope, budget or schedule
- Quality control and management procedures
- Monitoring and evaluation

NB Confucius said: “People make a plan work, plans alone seldom make people work.”
It is important to make the project plan with as much input as possible from the people who are going to make the plan work!
Checklist Project Failure factors

Unsuccessful project characteristics can be:

- insufficient use of status/progress reports
- use of superficial status/progress reports
- inadequate project manager administrative skills
- inadequate project manager human skills
- insufficient project manager influence
- insufficient project manager authority
- insufficient client influence
- poor coordination with client
- lack of rapport with client
- client disinterest in budget criteria
- lack of project team participation in decision making
- lack of project team participation in major problem solving
- excessive structuring within the project team
- job insecurity within the project team
- lack of team spirit and sense of mission within the project team
- parent organization stable, non-dynamic, lacking strategic change
- poor coordination with parent organization
- lack of rapport with parent organization
- poor relations with parent organization
- new type of project
- project more complex than parent organization previously has completed
- initial under-funding
- inability to freeze design early
- inability to close out the effort
- unrealistic project schedules
- inadequate change procedures
- poor relation
Checklist Project Success Factors

Successful characteristics of projects are:

- frequent feedback from parent organization
- frequent feedback from clients
- judicious use of networking techniques
- availability of back-up strategies
- organizational structure suited to project team
- adequate control procedure, especially for dealing with changes
- project team participation in determining schedules and budgets
- flexibility of parent organization and project team
- parent organization enthusiasm
- parent organization commitment to established schedules
- parent organization commitment to established budget
- parent organization commitment to technical performance goals
- parent organization desire to build up internal capabilities
- project manager commitment to established schedules
- project manager commitment to established budget
- project manager commitment to performance goals
- client commitment to established schedules
- client commitment to established budget
- client commitment to established performance goals
- enthusiastic public support
- lack of legal encumbrances
- lack of excessive government red tape
- minimized number of public/government agencies involved
## Checklist Quality Management

<table>
<thead>
<tr>
<th>Priority</th>
<th>Categories</th>
<th>Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Customer satisfaction</td>
<td>· Knowledge of customer requirements and expectations&lt;br&gt;· Customer relations management&lt;br&gt;· Customer service standards&lt;br&gt;· Commitment to customers&lt;br&gt;· Complaint resolution for quality improvement&lt;br&gt;· Customer satisfaction determination&lt;br&gt;· Customer satisfaction results&lt;br&gt;· Customer satisfaction</td>
</tr>
<tr>
<td>2.</td>
<td>Human resource Utilization</td>
<td>· Human resource management&lt;br&gt;· Employee involvement&lt;br&gt;· Quality education and training&lt;br&gt;· Employee recognition and performance management&lt;br&gt;· Employee well-being</td>
</tr>
<tr>
<td>3.</td>
<td>Quality results</td>
<td>· Quality of products and services&lt;br&gt;· Comparison of quality results&lt;br&gt;· Business process, operational and support service, quality improvement&lt;br&gt;· Supplier quality imp</td>
</tr>
<tr>
<td>4.</td>
<td>Quality assurance of products and services</td>
<td>· Design and introduction of quality systems&lt;br&gt;· Process and quality control&lt;br&gt;· Continuous improvement of processes, products and services&lt;br&gt;· Quality assessment&lt;br&gt;· Documentation&lt;br&gt;· Quality management of support a</td>
</tr>
<tr>
<td>5.</td>
<td>Leadership</td>
<td>· Senior executive leadership&lt;br&gt;· Quality values&lt;br&gt;· Management for quality&lt;br&gt;· Public respon</td>
</tr>
<tr>
<td>6.</td>
<td>Strategic Quality planning</td>
<td>· Strategic quality planning process&lt;br&gt;· Quality leadership indicators in planning&lt;br&gt;· Quality prio</td>
</tr>
<tr>
<td>7.</td>
<td>Information &amp; analysis</td>
<td>· Scope and management of quality data and information&lt;br&gt;· Analysis of quality data and informa</td>
</tr>
</tbody>
</table>
Checklist Time Management

From: Hect Consultancy

Time management

- Use your prime time to do the difficult or unpleasant task.
- Get to the point directly in conversations, letters and memos.
- Focus on one task at a time.
- Do the tough part of the task first.
- Be on time.
- Take speed reading courses.
- Increase your energy level through diet, exercise and rest.
- Know your energy cycle – protect your prime time.
- Positively visualize successful completion of the task.
- Learn to say no.
- Refuse to do the unimportant.
- Handle each paper only once (do it, delegate it or dump it).
- Use your commute or travel time for small jobs, correspondence, reading or listening to educational tapes.
- If you are stuck on a task, set it aside temporarily. Get a fresh perspective.
- Throw away bulk mail, unopened.
- Eat light lunches.
- Keep all notes and appointments in one calendar/diary.
- Keep your long term goals in mind as you develop your daily strategies.
- Keep an up to date, prioritized to-do list with you at all times in your calendar/diary.
- Delegate everything you can effectively.
- Write replies to letters or memos right on the piece of paper.
- Keep the commitments you make for yourself, including regularly scheduled times to exercise or relax.
- Confront procrastination.
- Return phone calls just before the end of the day.
Checklist Messages

Preparing a strong message

- Is your communication message clearly related to the communication objectives?
- Is it linked to the goals of your organization?
- Is your message of interest to your audience?
- Will your language, references, anecdotes, symbols etc. be understood?
- Have you started with points of agreement and good news before dealing with difficult issues?
- Are you providing an opportunity for feedback?
- If you are seeking action, have you made this clear?
- Are your concluding remarks reinforcing the message you want to deliver?
# Checklist Communication means and channels

<table>
<thead>
<tr>
<th>Spoken</th>
<th>Written/printed</th>
<th>Visual</th>
<th>Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits</td>
<td>Letters</td>
<td>Presentations</td>
<td>Internet</td>
</tr>
<tr>
<td>Interviews</td>
<td>Newspapers</td>
<td>Television</td>
<td>CD-ROM</td>
</tr>
<tr>
<td>Official speeches</td>
<td>Books</td>
<td>Slide shows</td>
<td>PC-demos</td>
</tr>
<tr>
<td>Telephone calls</td>
<td>Magazines</td>
<td>Films</td>
<td>List servers</td>
</tr>
<tr>
<td>Telephone conference</td>
<td>Pamphlets</td>
<td>Video’s</td>
<td>E-mail bulletins</td>
</tr>
<tr>
<td>Traditional decision</td>
<td>In-house Publications</td>
<td>etc.</td>
<td>Discussion groups</td>
</tr>
<tr>
<td>making forums</td>
<td>Publications</td>
<td></td>
<td>On line conferences</td>
</tr>
<tr>
<td>Meetings</td>
<td>Brochures</td>
<td></td>
<td>Etc.</td>
</tr>
<tr>
<td>Press conferences</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training sessions</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio broadcasts</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion groups</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearings</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>etc.</td>
<td>etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Criteria for selection**

- Purpose of the communication
- Message to be transmitted
- Target group
- Available resources (financial and staff)
- Seize of audience
- Complexity or sensitivity of issue
- Degree in which immediate feedback and response is desirable
- Credibility of the presence of the sender of the message

**Don’t forget**

- Names and addresses, telephone numbers of relevant contact persons
- Possibility to ask for more information and feedback (prepare a form)
- Account number where to make a contribution
- Establish a telephonic helpdesk or information number
- Survey and interview
Fact sheet - Mass Media

Otters are cute, but is it enough?

On first glance, one would think that communication in support of otter action plans should be easy. Otters easily rank among the most popular species, along with dolphins, pandas, tigers, elephants and a number of other flagship species. And unlike tigers, otters have the added advantage of being cute in an non-threatening way. But if communicating successfully about otters would be that easy, an article on this subject would not be needed. The other articles in this issue of Habitat make it clear that conservation of otters world wide faces all the problems that we find in nature conservation in general, such as destruction and fragmentation of habitats, pollution and hunting. Therefore it is likely that communication to raise support for otter action plans will face all the problems that we usually encounter when developing communication activities in support of nature conservation. So many groups have to be convinced that the otter is worth protecting: politicians, farmers, landowners, water managers, tourists and tourism operators, fishermen, foresters, factory owners, regional planners - the list of stakeholders whose ideas and action can determine the success or failure of otter action plans is endless. With so many people to be reached, trying to get coverage in the mass media such as newspapers, t.v. and radio seems the logical thing to do: mass media reach thousands - sometimes millions of people at the same time. They provide a unique opportunity to reach a large audience and generate support for otter conservation and no one who works in nature conservation can afford to ignore the mass media.

The impact of the mass media

In the Netherlands, the average citizen can currently choose from 35 television channels. On average these channels broadcast 20 hours of programmes a day; there are 700 hours of t.v available per day, 5000 hours per week. If an individual watches 20 hours of t.v. every week, he will still only see 0.4 % of everything that is on offer. In other words: 99.6% of all the ‘information’ offered via television this viewer will never even see. For newspapers the figures are a little better, but on average we read less than 10% of all the information in a newspaper. So the chances that someone will actually see a particular piece of information on t.v. or will read it in the newspaper are small.

Even if someone does notice the item about otter conservation that made the mass media, what will be its impact? What are the chances that an article about otters in the local newspaper will make someone who has always seen these animals as pests suddenly start thinking of them as valuable elements of the ecosystem? Unfortunately the chances are not very high. Two mechanisms are at work here:

To begin with, we are bombarded with so much information that we have become very efficient in filtering out only those bits and pieces that are of interest to us. This means that information in the mass media about otter action plans will primarily be noticed and read by people who are already interested in otters or nature conservation in general. Unless of course the news item has another hook for somebody’s attention: information about otter protection in a specific wetland will be read not only by people who are interested in otters but also by the farmers who live near that wetland.

Furthermore, we all prefer to keep our convictions, ideas and belief systems in tact; we don’t like to have our view of the world upset. We have very good - often subconscious - mechanisms to avoid information that is in some way upsetting or challenging. We avoid watching certain programmes or reading certain newspapers that we know might challenge our views. If we do come across upsetting information we try to neutralise it by saying the source of the information is unreliable, or by finding another source of information which does say what we would like to hear.

A woman who loves to drive her car is not very likely to watch a documentary about the damage to the environment caused by the ever-increasing numbers of cars. She knows that if she watched it and took its message seriously, she might have to give up something she enjoyed: driving her car. If she does watch it,
she will very likely try to disregard it as the biased product of some fanatic environmentalist group. But if an article appears in the newspaper the next day which states that according to the car industry expert the relationship between cars and air pollution is still unclear, this car-loving woman may read that article so that she can strengthen her own opinions and avoid having to consider changes to her behaviour.

Concluding: we tend to read and watch what interests us and does not upset us. We select information that we need, that we like or that will make us feel good and safe. If someone consciously starts looking for information that may be upsetting or challenging this usually means that he or she is already starting to doubt his convictions.

**What mass media can and cannot do for otter conservation**

What does this mean for the role of mass media to get support for otter action plans? So far it appears that trying to get a message across via the mass media is a combination of preaching to the converted and hiding a needle in a hay stack. But that would be an unrealistically negative view of the situation. Mass media can and do help nature conservation. However there are some things the mass media are just not good at, such as:

- resolving problems and conflicts of interest
- radically changing people's attitudes or behaviour
- developing consensus within society.

And unfortunately that is exactly what we want to achieve when we start communicating in support of otter action plans.

But mass media are very good at other things:

- giving factual information to a large audience
- drawing attention to an issue
- stimulating discussion
- putting pressure on politicians and industry
- getting people to do something if they are already convinced it is a good thing.

For example: a local authority is planning to cut down a river forest, which is an important otter habitat. Putting information in the mass media may help: it will inform people who are already interested in otters that something is happening, they may write protest letters to the authority. Most organisations want to keep a good image, and if there is some public support for conservation the local authority will hate being portrayed as an otter-killer in the local newspaper. Mass media can help mobilise public opinion, provided there is a public opinion to mobilise. Involving the mass media in the implementation of otter action plans is a good idea if the objective is to spread information, create a discussion, or get people to make a small change in their behaviour. If the objective is to fundamentally change people's attitudes or their behaviour, other communication instruments are more appropriate.

**Talking with the people who matter**

The problem with mass communication via radio, t.v. or newspapers is that people don't have the chance to say anything back. There is usually no easy way of knowing whether the message reached them, whether they understood it, or whether they agreed with it. The effect of communication remains unclear.

The other problem with communicating via the mass media is that you do not really know who you are talking to. In fact, you are talking to everyone and anyone, to the general public. And although this may seem a strange question: what can the general public actually do in support of otter action plans? It is not the general public who decides on hunting quota for otters - it is the department that regulates hunting, in consultation with hunting associations and nature conservationists. It is not the general public who use nets and traps which kill otters: its is the fishermen, with the permission of the fishing authorities. It is not the general public who discharges organic chemicals into a river - it is the chemical industry of the farming sector.
Many of the problems in nature conservation in general - and this also applies to the implementation of otter action plans - have to do with clashes of interests between conservationists and other clearly identifiable groups such as farmers, local and regional planners, members of angling associations, foresters …… Frequently, nature conservationists expect or even demand that these people will change their attitude and their behaviour quite radically - sometimes in a way that will cost them money. Looking back on what was said before about the limited effect of mass media on behaviour and attitude, it will become clear that newspaper articles, t.v. documentaries and radio interviews are not the most effective approach to solving concrete conflicts of interest and to getting people to change their behaviour in a radical and expensive way. In situations such as these direct, personal communication is the more effective and mass communication should only be used if there is no other communication available.

Often there is no ‘technical’ reason to use mass communication. The number of people who have a direct effect on success or failure of otter action plans - especially at the local level - can be so small that direct, even face to face, forms of communication are possible. In many countries relations between conservationists and stakeholder groups such as farmers, fishermen and water managers are not very friendly - to say the least. Conservationists should take care not to portray people who disagree with them as unreasonable, stupid, evil or uncivilised and therefore as ‘beyond communication.’ Most human beings have their reasons for doing what they do and this also applies to groups that come into conflict with conservationists. From their perspective of the world, they are acting in a completely rational way; they are just trying to make a living, trying to provide for themselves and their families. Sending one-way messages at them via the mass media will not get them to co-operate with otter action plans - or at least to stop opposing them. This requires more direct communication, which will allow them to react to messages, where it is clear if there are misunderstandings, and where ideas can be exchanged.

Direct communication with stakeholder groups on conservation issues is difficult and sometimes (but no as often as we think) the differences of opinion are so deeply rooted that it is impossible. Still, mass media campaigns aimed at the general public have even less chance of solving the real problems facing the implementation of otter action plans.

**Communication with the general public**

Although in my opinion direct and two-way communication with relevant stakeholder groups should form the core of communication activities in support of otter action plans, it remains important to raise support for otter conservation with the general public. Conservation will become a lot easier if most of the population - even if they live in towns and will never see an otter in their lives - like what we are doing. It will make the stakeholders who are directly involved such as the fishermen and landowners more willing to listen to us. As mentioned before, mass media coverage is a good way to get information to the general public. However to achieve real changes in attitudes it is also necessary to develop communication activities which focus on specific groups of the general public, such as children or local women’s groups. You have to bring your message to their doorstep, bring information to places where these groups frequently come, present it in a way that appeals to them, that relates to their daily life, and preferably, you have to give them something to do. People in general don’t like to hear doom and gloom messages. They do not like to hear that unless something is done, the otter will become extinct in region X, Y or Z within two years, if you don’t also tell them what they can do to prevent this. People don’t like to feel helpless.

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The text does not provide any specific reference numbers or page locations.
**Finally: how to get mass media coverage**

Getting the mass media interested in otter conservation is not something that you will be able to do in a day or even a month. You will have to invest a lot of time and effort into exploring the different newspapers, journals, magazines, radio and t.v. channels which might be interested in your work. It will take even more time to establish a good personal relationship with reporters and journalists. The following suggestions may help you but in the end it will all depend on whether journalists will think that you have something to say that is interesting enough.

1. Be prepared. Explore the market and make sure that you have the necessary information available before you really need to contact the press. Find out which media cover environmental issues and which journalists report on them (this can be done by carefully reading papers and magazines, and watching radio and t.v. programmes). Assess what kind of issues they cover. Make a database (or a list) of names, addresses, telephone numbers, fax numbers etc. of the editorial offices and of individual journalists. Do not forget about the freelance journalists. They are not attached to any specific newspaper or programme and they are always on the lookout for a story to sell. Don’t forget Internet - don’t forget radio. Ask for help if you can’t find this kind of information by yourself. Other organisations may have more experience in press contacts than you.

2. When you think of contacting the media, step back and decide for yourself what you want to achieve. Are there particular groups you want to reach (farmers, children, landowners in a certain region, politicians)? Can you reach them in a more direct way? What is the message you want to give? Decide whether a mass media approach is most suitable. If it is, decide which media or journalists will be most interested in you and your news, and which media are most popular with the groups you want to reach.

3. Do you have News? Journalists want news of some sort. Be aware that what is important to you may not be even the least bit interesting to a journalist. Be self-critical. Is your news really News? The publication of a research report may be a big event to you, but unless it contains shocking new discoveries the media will not be interested. Don’t bore journalists with an endless stream of phone calls and press releases about unimportant issues; you will only ruin your good name and credibility. Never complain to journalists if they don’t pay attention to you. What actually is ‘news’ depends on the journalist. A journalist specialised in environmental issues who regularly contributes to the science section of a major national newspaper will have another definition of news than a reporter working for the breakfast show on a local radio station.

4. To a certain extent you can make something News. A research report can become News if you present it to a local politician who is then photographed feeding an otter. Invite celebrities to your events - the press will follow.

5. Try to establish good personal contacts with journalists. Help them even if there is nothing in it for you, for example when they call you to ask for he address of another organisation. Be nice to them - help them do their work - but don’t be humble: remember that in the end they need you as much as you need it.

6. Prepare for interviews - carefully think about what you want to say. Practice with colleagues or family. Tape it and listen to it to improve your performance. Forget you are a scientist or a policy maker: speak understandably, avoid jargon, and try to think as a member of the audience that you want to reach.

7. Learn to write good press releases. A good press release should be no longer that 2 pages of A4 typed with 1,5-line spacing.
It should have a clear and interesting headline. In the first paragraph of the press release you should answer the questions who, what, where, why, when and how. After reading it, a journalist should know if this press release is interesting for him or not. In the following paragraphs you give the full story. Smaller local newspapers appreciate ready to print articles. Prepare these if necessary or write your press release in such a way that it can be used as an article. Again: avoid jargon, think like a member of the target group. If you have good illustrations (photographs or video) that the press may use, mention that as a footnote in the press release. Also mention in a footnote whom the press can contact for more information. Make sure that this person is available and can be easily reached by phone.

8. Never leave media contacts to the last minute - start preparing in time. Send out invitations to media events in time so that reporters can plan their work.

9. Remember that journalists like scoops - to be the only journalist who has a story. If you have established really good relations with a journalist, you can give him or her an exclusive story, but be aware of the effect it may have on your relationship with other journalists.

10. Don’t ever lie to the press, don’t exaggerate or make promises you can’t keep. They will never believe you again.

Even if you follow all these rules, trying to get into the mass media may be very frustrating when these darned journalists just won’t do as you tell them. Remember that good journalists never do as you tell them.

Conclusions

It would be unrealistic to pretend that big changes in the behaviour of stakeholder groups can be achieved through communication alone. People will rarely change their behaviour unless this change offers some clear benefit to them; this benefit does not have to be material (it can also be ethical or moral gratification, or an increase in social prestige and status), but very often financial compensation or benefits are needed to get something done. Sometimes only the pressure of the law can help. Sometimes only a good high fence around a highly sensitive protected area will help. Conservationists should not put all their trust in communication; it is an indispensable tool but it can’t solve all conservation problems. Within the whole range of possible ways of communicating, conservationists should not put all their trust in mass media coverage. Again: it is indispensable, but it won’t always achieve what you want to achieve.

However, communication in support of otter action plans has one clear advantage. That is the otter itself. Otters are cute, it is not enough to solve the problems, but it helps.
At the end of this module the participants understand:

- That planning communication needs decisions about target groups, objectives, messages, media and organisation/budgets etc.
- That planning is a prerequisite for effective and efficient use of resources for communication.
- How to prepare a strategy in 10 steps

10 steps

1) Analysis of issues
2) Outline of role of communication
3) Determination of the target groups
4) Determination of the communication objectives
5) Determination of the strategy/message
6) Determination of means
7) The budget
8) Organisation
9) Plan
10) Evaluation

Four phases

- Phase 1: Analysis
- Phase 2: The strategy
- Phase 3: The planning
- Phase 4: Monitoring & Evaluation

Phase 1: Analysis (1)

This phase includes steps:
1) Analysis of issues
2) Outline of role of communication
3) Determination of the target groups

Phase 1: Analysis (2)

- Analysis of issues should be done in relation to target group
  - 1st : analysis by yourself, to be prepared (pyramid, matrix)
  - 2nd : together with target group:
    - questionnaire
    - interviews
    - Participatory Rapid Appraisal: (PRA)
Module 8: Developing a Communication Strategy: 4 phases, 10 steps

Phase 1: Analysis (3)
The role of communication depends on
- the level of individual needs (pyramid!)
- the KAP: Knowledge, Attitude, Practice
- All this helps you to analyse perceptions, barriers and stimuli
  - This phase helps you to understand, to be prepared, and thus allows you to be flexible!

Phase 2: Strategy
This phase includes steps:
4) Determination of the communication objectives
5) Determination of the strategy/message
6) Determination of means

Step 4: Communication Objectives (1)
- Recap: difference communication and conservation (or programme) objectives
- Ask: What do I want to achieve with my communication? ('Intended Result')
- Be specific: aim at K.A. or P?
- Include specific characteristics (target group, percentage to be reached, type of impact, time frame): make it S.M.A.R.T.E.

Communication Objectives (2)
S.M.A.R.T.E
(or how to make objectives verifiable)
- Specific
- Measurable
- Acceptable
- Realistic (means, methods)
- Time aspects (how many, start, etc)
- Economically feasible

Step 5: Defining a message
- Don't just start!
- Defining the message comes only after:
  - problem analysis
  - definition of objectives/communication objectives
  - determining and analyzing the target groups
- What has happened before? Have you or others communicated on this matter before?

The message (1)
- Do you know what you are talking about?
  - What exactly do you want to say?
  - What is the main element of your message?
  - What arguments will you use?
  - What information do you need to include?
  - Which information is not relevant? Don't be afraid to select!
The message (2)

- Join them - because you cannot beat them
  - think from the perspective of the target group how do they think, and feel and see the world?
  - use words & symbols that they will understand.

The message (3)

What does a modern teenager recognise as a telephone?

A message may be lost when the symbol is not recognised!

The message (4)

- What can you offer the target group?
  - People select information to support their own ideas
  - People generally do not like to change their ideas or convictions
  - They will only do so if there is something in it for them: enjoyment, status, feel good, other benefits

The message (5)

- Don't teach, Don't Preach
  - respect the target group, take them seriously
  - never indicate that you know best.
- Speak the truth, the whole truth and nothing but the truth
  - or at least don't lie, exaggerate, or make promises you cannot keep
- Actions speak louder than words

The message (6)

- Told – Heard
- Heard – Listened
- Listened – Understood
- Understood – Agreed
- Agreed – Acted upon
- Acted upon - repeated

The message (7)

K.I.S.S.

Keep it Short and Simple
The message (7)

Short Checklist: P.P.T.
- Promise
- Proof
- Tone of Voice

The Channel (2)

- Don't hide
  - Personal communication is always the best
  - Don't hide behind paper or videotape unless you need to
- Choose the most direct and personal way of communicating with the target group
- Hide
  - How will the target group look at the message coming from you?
  - If you are not credible use someone else

The Channel (4)

- Don't rely on your own judgement
  - Pre-test messages on representatives of the target group
  - At least try them out on friends or family

Step 6: The Channel (1)

- The vehicle to transport your message
- Select: Which media? Which means?
- Use checklists! (see Module 8)
  - Interpersonal
  - Print
  - Audio-visual
  - Digital

The Channel (3)

- Getting the message to the target group
  - Do you know what the target group reads, where they meet, which organisations they belong to, who they trust? Analyse!
- The medium is the message
  - A message is more than the content
  - What is between the lines matters as much as the words
  - Your body language & your dress matters, so does the layout of a brochure or the radio station you use

The Channel (5)

When selecting the channel, keep in mind:
- Intermediaries
- Cost
- Reach/coverage
- Impact
Module 8: Developing a Communication Strategy: 4 phases, 10 steps

Module 8

Group exercise (part 1)
- Same two groups
- Use same case as in previous exercise
- Prepare 5 transparencies:
  - ‘the issue’ & the conservation objectives
  - ‘the stakeholders and the target groups’
  - ‘the communication objectives’
  - ‘the message’
  - ‘the media’
- Maximum: 5 bullet points per sheet

Module 8

Time management
- Keep it simple! Define not too complex issue, with few stakeholders. Recap of issues: 10 min.
- Group discussions & preparations: 1 hour
- Plenary feedback: 50 minutes
  - 2 group presentations: 10 mins each
  - 2 evaluations & discussions: 15 mins each
  - The two groups will evaluate each other! (content and body language/presentation skills)

Module 8

Phase 3: The planning
This phase includes steps:
7) The budget
8) Organisation
9) Plan
Ready for execution!

Module 8

Planning the Project
Three factors to balance:
- Time
- Budget
- Quality

Module 8

Project planning
- Starting and finishing date
- There are critical points in a project which if the time is not met, the project cannot finish on time.
  - Quality controls have to be set for each phase, as a go ahead /no go point
  - Project planning determines what product of what quality can be produced in the given time.

Module 8

Management objectives:
S.M.A.R.T.E.
- Specific
- Measurable
- Acceptable
- Realistic (means, methods)
- Time aspects (how many, start, etc)
- Economically feasible
Planning

But... don’t stick to your plan!
- When working on your message you may realise that you have to revise your plans: be prepared to be flexible!
- Perhaps it is not possible to reach your objective in one go, you may need to break the message into smaller units
- You may realise that the target group is is not one group, but several smaller groups
- You may have to repeat your message
- Don’t try to be cut corners or be too efficient (keep the process in mind)

Work plan
Set quality criteria for each step:
- Formulate idea
- Structure
- Content draft
- Critical point
- Test
- Produce
- Distribute

Project timeline

Example: planning for a brochure
- Form idea
- Structure
- Contents
- Draft text for target group / draft layout
- Test: improve
- Layout, illustrate
- Produce
- Distribute, market: distribution plan
- Feedback, evaluate

Planning a brochure

<table>
<thead>
<tr>
<th>Date required</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 week</td>
<td>distribution</td>
</tr>
<tr>
<td>6 week: printer</td>
<td>printer</td>
</tr>
<tr>
<td>7 week: proofs</td>
<td>proof time</td>
</tr>
<tr>
<td>9 week: illustration</td>
<td>text illustration time</td>
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<tr>
<td>9 week: photo</td>
<td>photo costs</td>
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<tr>
<td>9 week edit</td>
<td>editor costs</td>
</tr>
<tr>
<td>11 week writer contract</td>
<td>writer costs</td>
</tr>
<tr>
<td></td>
<td>management time</td>
</tr>
</tbody>
</table>

What was missing??

- Time to incorporate results from testing
- Time for unexpected deviations
Module 8

Phase 4: Monitoring & Evaluation

- Not last, not least
- M&E is a continuous process
- Not only at the end
- Quality control
- Use the feedback!
- M&E is the Advertisement for your project

(Hand out Arrow)

Module 8

Group exercise (part 2)

- Continue working on our case example
- Prepare 5 transparencies:
  - The 5 (revised) results part 1
  - The budget
  - The organisation
  - The planning
  - The M&E approach
- Maximum: 5 bullet points per sheet

Module 8

Arrow Communication Planning in 4 Phases

Module 8

Time management

- Group discussions & preparations: 50 mins
- Presentations & feedback: 50 minutes
  - 2 group presentations: 10 mins each
  - 2 discussions: 15 mins each
- Plenary selection of project for funding (20 min)
Module 9: Improving presentation skills
Module 9: Improving Presentation Skills

Personal effectivity in communication

I. Objectives

After his module, the participants:

- understand how to present an idea (rationale, objectives, result, approach) to others (who have no or less interest in the issue) in a clear and appealing (raising interest, showing benefits etc.) way
- will have experienced and internalised the fact that the theory of communication applies as well to their own daily activities, in this case their way of presentation or writing.
- understand that for effective communication it is necessary first to reflect on issue, target group, objective and message.
- have experienced that communication is not only about words, images and figures, but as important also about signals (tone of voice, body language, choice of credible persons to convey messages etc.) and about being able to reach the target group on a level of concern, interest, motivation etc.
- are able to evaluate their way of presenting against the criteria of a checklist.

II. Programme

1. Improving Presentation Skills
2. Learning by Doing
3. Integrated exercise

III. Working Methodology

1. Improving Presentation Skills

Duration: 30 min
Role of other facilitators: no specific role
Procedure:
- A short presentation using PowerPoint slides on how to prepare for an effective presentation
- How to prepare for good contents with reference to your target audience
- What to pay attention for regarding body language and other signals
- Note: this is a very basic introduction!

2. Learning by doing

Duration: 60 min
Role of other facilitators: distribution of materials; facilitation
Procedure:
- ‘Learning by doing’ is considered the most effective way to learn how to give an effective presentation. The exercise will focus on presentation skills and evaluation skills.
- Each participant will be given 10 min to prepare a short presentation of 3 minutes (sharp!) to introduce his/her organisation to the group. Support materials can be used.
- The group will sit in a semi-circle. The person on the left side will start with a presentation.
- The person on the right sight will evaluate the contents; the person next to him will evaluate the body language (1 min each). The others can add (1 min).
3. Integrated Exercise

Duration: -
Role of other facilitators: -
Procedure:
- In the previous exercise the participants have experienced, sometimes for the first time, giving a presentation, and how to evaluate it on analysis, content, body language, appeal to target group etcetera
- Improving skills can only be done by practicing. Therefore, the coming modules will entail several occasions in which the participants will need to give presentations. In each case, someone else or another group will evaluate the presentation.
- The facilitator is to keep track of whom has presented yet and whom not, and should make sure everyone has at least 1 opportunity, especially those who are insecure or not so experienced.

IV. Support materials

Attached to this module, one will find:

<table>
<thead>
<tr>
<th>Support materials</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Lists</td>
<td>2</td>
</tr>
<tr>
<td>Fact Sheets</td>
<td>2</td>
</tr>
<tr>
<td>Power Point Papers</td>
<td>1</td>
</tr>
</tbody>
</table>
Checklist Preparing a Presentation

Preparation
- Take time to prepare and organise your talk. To be effective, do not underestimate the time it takes to prepare yourself. Giving a brief presentation proportionally requires more preparation time than a long talk.
- It is very difficult to shorten a presentation on the spot once you realise the talk is running over time. Be prepared to reduce the length at the planning stage.
- Use at least one visual aid like a transparency, PowerPoint, flip-over or the white board during your presentation.
  - Use as little text as possible on your visuals; preferably use bullet points with key words only.
  - Write down in one phrase the message you plan to convey to the audience, before giving the talk.
  - Check the room: which equipment is suitable, how distant is the audience from the screen, etcetera.
  - Check the equipment before you start the session.
  - Is the text readable from the back of the room?
  - Rehearse!

Segment & analyse your audience
As a speaker, your first task is to capture the attention of the audience. When you start preparations, ask yourself:
  - How many people will attend?
  - Which people will be in the audience?
  - Who is most important for my mission/objective?
  - What do they already know about the subject?
  - What do they need to know about it?
  - What will interest them about it? What would motivate them?
  - How much new information on the topic can they absorb?

Timing/organisation
- The K.I.S.S. rule: Keep It Short & Simple
  - Speaking from notes, using cards or slides with key words, is more natural and appealing. Time keeping is more difficult though. Plan to fill 80% of the time available.
  - If you write down your talk, remember that on average, people speak 150 words per minute. A 10 minute talk, should therefore not be longer than 1250 words, to allow for some opening words and a short recap at the end.
  - Do not plan too many slides or sheets. A single sheets usually takes 1-2 minutes.
  - Be cautious with circulating materials (hand-outs) during your presentation. People will be distracted.
  - Allow for time for questions and discussion.
**Objective**

What is the objective of your presentation in terms of behaviour you want to see in your audience if the talk is a success? Against this objective, you can test all your options in selection and/or omission of material, the structure of your talk, the choice of the visual aids, etcetera. Try re-phrasing your objective in different ways; this might give you new insights!

- When phrasing your objective, ask yourself: what effect do I want?
  - Attention (“nature is rapidly disappearing…”)
  - Knowledge (“this will happen if…”)
  - Attitude (“think of future generations…”)
  - Intention (“the family next door is already a member…”)
  - Action (“become also a member, it is neither expensive nor troublesome…”)

- Be realistic: what do you realistically need to achieve?
  - Sell you car and walk for ever
  - Walk once a week
  - Walk once
  - Drive a little slower

- The A.I.D.A, rule: Attention .
Checklist Causes for breakdown in communication

1. **Linguistic problems:**
   the language is too difficult or specialised, or what is said can be interpreted in different ways.

2. **Emotional charge:**
   the receiver gives the message a different emotional charge than intended by the sender.

3. **Projection:**
   one assumes that the other person feels the same about a subject as oneself or that the other person has the same opinion about it as oneself.

4. **Prejudice:**
   the other person is identified with a group or particular point of view. The message is not targeted properly at the person him/herself; not did the receiver check his assumptions.

5. **“Hidden agendas”:**
   the parties each have their own objectives or reasons for the conversation, but do not make this evident to the others; so each party wonders what the other really wants.

6. **Differences in level of knowledge:**
   for instance, you think it makes you look stupid to admit that you don’t know something; so you don’t ask for clarification.

7. **Acceptance level:**
   the effectiveness of the message depends not only on the quality of the message and the manner in which it is conveyed, but also on the extent to which the receiver is willing to accept that message (“talking to the deaf”).
**Fact sheet: Presenting is Communicating**

When in contact with another person or a group of people, you start influencing each other. From a meeting with fishermen in the harbour or in a farmer’s kitchen, to an informal discussion, a workshop or a presentation for 100 participants to a congress; you communicate. When preparing for any sort of meeting or presentation, be aware of the following basic rules:

**Four rules for communication**

1. **You cannot not communicate**
   
   As soon as you are near someone you start influencing each other. Being silent also has a meaning, it might say that you are not interested in the other person. Your attitude right before or after a presentation also influences your audience.

2. **People communicate mainly without words**
   
   Of course people communicate with words, but emotions are mostly expressed through body language. Words and body language may contradict each other. The conflicting messages can be confusing to the receiver. Saying that you are open to suggestions, while sitting with your arms crossed and with your body turned away from the person you are talking with, may signal that you are not so interested after all. Communication only works well when words and body language are in accordance with each other.

3. **My interpretation is not necessarily someone else’s interpretation**
   
   We often hear what we want to hear. With different expectations and needs in mind, you might interpret a conversation differently than someone else.

4. **The relationship between people influences the communication**
   
   A subordinate will talk to a superior differently then to a direct colleague. It is important to recognise this and to be aware of such differences in relationship. The same is true for the environment in which the conversation takes place: a meeting in a Director’s office will be different then a meeting with fishermen at the harbour. Communication begins to fail when one party refuses to accept the position of the other.

*And remember, Said is not necessarily heard….:*

- Said: heard?
- Heard: understood?
- Understood: agreed?
- Agreed acted upon?
- Acted: repeated?
Fact sheet Evaluating your presentation through feedback

**Feedback**

Getting feedback can be a very effective way of gathering knowledge about the project or activities, or about the presentation that you have just given. And if you succeed in using feedback, it creates an opportunity to adjust approaches or behaviours in order to manage the project or presentation properly and accomplish the objectives set at the beginning. In that sense, feedback is one of the tools available for monitoring and evaluation (Module 9). In another sense, feedback can also be an indirect tool for engaging people in a project.

Giving feedback is not easy, especially not in an intercultural setting in a regional programme like PERSGA. The Western mode of using feedback as a tool to become more effective in presentation or project, is not accepted equally everywhere. Feedback is a subtle communication element that requires communicative skills such as listening and being sensitive. It also requires cultural knowledge that allows one to interpret culturally influenced behaviour. If feedback can be used, it should be done in a local, appropriate way.

**Two ways of feedback can be distinguished:**

- A mechanism for communication: a way to check whether the message has been received correctly
- A tool to improve individual (or project) performance. Feedback then, is a way of help; it is a corrective mechanism for the individual who wants to learn how well his behaviour matches his intentions.

**Some criteria for useful feedback (Reference: NTL Institute for applied Behavioural Science):**

1. Feedback is descriptive rather than evaluative. By describing one’s own reaction, it leaves the individual free to use it or to use it as he sees fit. By avoiding evaluative language, it reduces the need for the individual to react defensively.
2. It is specific rather than general. To be told that one is ‘dominating’ will probably not be as useful as to be told that ‘just now when we were deciding the issue you did not listen to what others said and I felt forced to accept your arguments of face attack from you.’
3. It takes into account the needs of both the receiver and giver of feedback. Feedback can be destructive when it fails to consider the needs of the person on the receiving end.
4. Feedback is directed toward behaviour which the receiver can do something about. It is only frustrating when a person is reminded of some shortcoming over which he/she has no control.
5. Feedback is solicited, rather than imposed. Feedback is most useful when the receiver himself has formulated the kind of question which those observing him can answer.
6. It is well-timed. Feedback is most useful at the earliest opportunity after the given behaviour (depending, of-course, on the person’s readiness to hear it, etcetera).
7. It is checked whether it is well understood. Let the receiver try rephrase the feedback he has received to see if it corresponds with what the sender had in mind.
8. The accuracy of feedback is checked in the group. When feedback is given in a group, both giver and receiver have the opportunity to check with others in the group the accuracy of the feedback. Is this one man’s impression or an impression shared by others?
Module 9: Improving Presentation Skills

Communication

- Said: heard?
- Heard: understood?
- Understood: agreed?
- Agreed: acted upon?
- Acted: repeated?

Effective communication

- Formulate result in advance
- Do not improvise
- Communication with a AIDA result

The K.I.S.S. formula

- Keep
- It
- Short &
- Simple

The AIDA formula

- Attention
- Information
- Desire
- Action

Personal effectiveness in communication

- Presentation & communication skills
- The theory of communication applies to our own daily activities as well:
  - Preparation and content of a presentation: reflect on issue, target audience, objective and message
  - Signals (tone of voice, body language, choice of credible person, etcetera)
  - Learning by doing
  - Learning through evaluation

Communication

- Heard: understood?
- Understood: agreed?
- Agreed: acted upon?
- Acted: repeated?
Module 9

Segment & analyze audience

• Which people are in the audience?
• Who is most important for my mission?
• What do they know, feel about my mission?
• What would motivate them for my mission?

Module 9

Messages: be realistic

• Sell your car and walk for ever
• Walk once a week
• Walk once
• Drive a little slower'

Module 9

What effect do I want?

• Attention (" nature is rapidly disappearing…")
• Knowledge ("this will happen if…")
• Attitude ("think of future generations…")
• Intention ("the family next door is already a member…")
• Action ("become also a member, it is neither expensive nor troublesome…")

Module 9

Checklist

• Core message
• Audience
• AIDA
• KISS
• Speak slowly
• Mind your body language
• Be yourself
Module 10:
Case studies
Module 10: Case studies

I. Objectives

After this module, the participants will:

- have insight in the ways communication has been used for nature conservation in the region
- understand the different roles of communication during the different phases of the life cycle of a project or policy
- understand the specific regional and national lessons learned
- are able to incorporate these lessons learned into their own planning and strategy making
- feel encouraged to use the case studies as illustrations in a training or workshop
- feel encouraged to use the case studies to convince decision makers of the importance of communication
- feel encouraged to share further experiences to be included in the manual (new supplement)

II. Contents

This module does not consist of a training programme but rather contains case studies of communication programmes that were implemented in the region in support of nature conservation.

The case studies are being presented in a fixed format, which will enable the readers to compare and evaluate the cases systematically.

Contact details are provided per case study. Should the reader like to obtain more information or share experiences, the authors can be contacted at all times.

Readers are encouraged to submit further examples of case studies from their countries, should they think these would further illustrate regional experience.

III. The Policy Life Cycle

through during its lifetime. These phases are: identification, formulation, implementation and management & control. In each of these four phases, communication will be used in a different way. Every person working in policy development or project management, be it in an NGO or as Government or private sector employee, will recognise the stages of the life cycle. It is therefore a very practical and convincing way of showing how communication can work. Especially if one intends to use the cases to illustrate the success and added value of communication to for example decision makers, then it will be worthwhile linking it to the policy life cycle, so that they can easily see how communication would fit at what stage in their work or the proposed project. For further information, the reader is referred to module 6.
**IV. Fixed Format**

**Structure**
- 1 page A4
- structured narrative form
- attractive, simple language
- 1 picture
- State on top: the role of communication in the … (formulation, preparation, implementation)
- phase

**Contents**
The case study shall be described in a narrative way, using simple and attractive, non-technical language. However, it should structurally include the following contents:

Header: This project in … (country) shows how communication can be used in the … (preparation, formulation, implementation etcetera) phase of a [project, policy]
1. Country, project, organization (short background narrative)
2. The conservation issue & the conservation objective. Where are we now? Where do we want to go?
3. What was the role of communication?
4. Describe communication strategy (in narrative, but including all steps)
5. Implementation (Include what went well, what went wrong. The reader will want to learn from your experience)
6. Use of feedback (How did you react to Monitoring & evaluation results)
7. Conclude with one captive sentence: The lesson learned in this project was…
8. State contact details at the end, preferably e-mail