SGCI ● IOSRS

# COMMUNICATING
# WITH THE PRIVATE SECTOR

## A TOOLKIT FOR SCIENCE GRANTING COUNCILS IN AFRICA

**SKILLS AND STRATEGIES FOR PARTNERSHIPS**

# Communicating with the Private Sector
# A Toolkit for Science Granting Councils in Africa

March 2019

# Contents

# Foreword

The goal of the Science Granting Councils Initiative in sub-Saharan Africa (SGCI) is to strengthen the capacities of Science Granting Councils (and related organizations) in order to support research and evidence-based policies that can contribute to economic and social development. Towards this goal, the SGCI, among other activities, is investing in strengthening the capacity of Africa's Science Granting Councils to facilitate exchange of knowledge with the private sector.

A plethora of evidence has revealed that strategic engagement between the public and private sectors is not only essential but urgent. With the global development blueprint articulating the need to invest in Science Technology and Innovation (STI) and strong partnerships for a more sustainable future, there has been a growing momentum to leverage private capital for inclusive growth and development.

Often, non-technical actors perceive STI as abstract and with no immediate returns. In other instances, the complex content that saturate the STI discourse are unrelatable. In yet other contexts, there is no provision of frameworks to facilitate public-private partnerships. A global partnership, the SGCI has taken the conscious effort to support publicly-funded research funders to engage with the private sector and to unlock the potential synergies for sustainable STI.

We appreciate the need to provide the Science Granting Councils with a robust guidance that can support effective and sustainable engagement with the private sector. This toolkit delineates how to initiate communication and engagement with the private sector and make these as impactful and fruitful as possible.

By compiling and synthesizing content from continuous monitoring and evaluation, training workshops, feedback from participants and implementors of Theme 3 of the SGCI, this toolkit outlines a series of steps to pursue towards cultivating and sustaining relations with the private sector. While the guidelines have been specifically tailored for Africa's Science Granting Councils, the insights it provides are relevant for other STI actors.

One of the core intentions of public-private partnerships is to leverage co-investments in STI interventions. Inevitably, it is imperative that we reconcile private investment and public benefits, a mission that requires specialized tools and approaches.

This toolkit has a strong focus on how to implement practical strategies, such as audience mapping to identify your specific target audience and their needs, or how to produce actionable communication implementation plans.

I am excited that the toolkit is designed as a self-sufficient tool that can be adopted with minimal effort. It is my hope that Science Granting Councils in the Initiative will embrace it and that it will support and build their confidence to explore synergies with the private sector.

**Ellie Osir, PhD**

Senior Programme Specialist
International Development Research Centre, IDRC

# About the Science Granting Councils Initiative

The Science Granting Councils Initiative in sub-Saharan Africa (SGCI) is a five-year Initiative which aims to strengthen the capacities of Science Granting Councils (SGCs) in sub-Saharan Africa to support research and evidence-based policies that will contribute to economic and social development. The objectives of this Initiative are to strengthen the ability of Councils to (i) manage research; (ii) design and monitor research programmes based on the use of robust science, technology and innovation (STI) indicators; (iii) support knowledge exchange with the private sector; and (iv) establish partnerships between Councils and other science system actors.

The Initiative is jointly funded by the United Kingdom's Department for International Development (DFID), Canada's International Development Research Centre (IDRC), and South Africa's National Research Foundation (NRF). The SGCI currently operates in 15 sub-Saharan Africa countries including: Kenya, Rwanda, Uganda, Tanzania, Ethiopia, Côte d'Ivoire, Botswana, Burkina Faso, Senegal, Ghana, Zambia, Mozambique, Malawi, Namibia, and Zimbabwe. For more details: **www.sgciafrica.org**

Theme 3 of the SGCI focuses on strengthening partnerships between Africa's science granting councils and the private sector, with the ultimate objective to: (a) enhance knowledge exchange between academia and industry and (b) stimulate private sector investments into research and innovation.

Theme 3 is being implemented by a Consortium comprising the African Centre for Technology Studies (ACTS), The Scinnovent Centre, the Science, Technology and Innovation Policy Research Organization (STIPRO) and the Association of African Universities (AAU).

# About the training toolkit

When key actors in the research and innovation landscape work in isolation, a huge opportunity to leverage resources, skills and expertise is missed. This toolkit provides a framework for science granting councils to champion strategic communications and engagement with the private sector and other stakeholders. It suggests ways to design and implement structured communication and engagement in projects, programs or institutions.

The toolkit is conceived as a guide containing resources and materials to help plan and execute a three-day training workshop. The design, presentation, and content are geared towards supporting customized, self-use by the facilitators.

The toolkit is organized into three parts:

Part one contains a description of the workshop including the objectives, expected outcomes, target audience and the training topics

Part two includes the facilitators' guide designed to enable trainers to deliver interactive, participatory training. The facilitators' guide details the aims, methods of the training, resources required, training exercises, step by step guide on the delivery of the topics and handy tips to enable trainers achieve optimal results. Presentations, handouts, case studies, and other training materials are included. Trainers are encouraged to distribute the case studies and hand-outs to participants to facilitate learning.

To make the training a fully customized learning experience, facilitators are encouraged to update slides as needed, to make the slides more appropriate for specific countries, contexts or participant interests.

The facilitators' guide emphasizes interactive learning to ensure all participants are actively engaged and contribute to the discussions. It includes the following:
- Training approach and how to prepare
- Planning/scheduling
- Daily agendas and session learning objectives
- Step-by-step instructions to facilitate sessions, activities, and group work
- Suggested talking points

Part three contains the resources including powerpoint slides that can be customized to suit needs/context, a social media guide, references for further reading etc. Supplementary materials (included in the annexes) including sample survey tool for pre-training assessment; PowerPoint slides; activity materials and exercise worksheets; references to case studies on successful private sector engagement; facilitation tips and resources, examples of communications plans and strategies, and further reading materials

# How to use the toolkit

This toolkit is designed for use in two main ways:
1) As a training manual - At the core of the toolkit are step-by-step guides that Science Granting Councils (or any other actors/users) can follow to implement a training workshop.

2) As a reference manual - The step-by-step guides are complemented by several resources and tools that the Science Granting Councils can use to develop organisational communication strategies and implementation plans

# Acknowledgement

# ABOUT THE TRAINING WORKSHOP

## PART

# 1

The training targets individuals who work in science, technology and innovation issues across different sectors.

# Introduction

The training workshop is conceived as a customized learning experience to enhance individual and organizational capacities to effectively and efficiently communicate and engage with the private sector. Delivered as a highly participatory workshop, it introduces the fundamental principles of strategic communication and engagement both at internal and external levels and equips the participants with the skills for developing (i) strategic communications implementation plans and (ii) a communications strategy.

The workshop is organized into seven interactive sessions.

| Session | Unit (s) | Duration |
|---|---|---|
| 1.  Getting Started | Introduction | Two hours |
| 2.  Settling in | 1 and 2 | Five hours |
| 3.  Learning by action | 3 | Six hours |
| 4.  Evaluating to learn | 4 and 5 | Two hours |
| 5.  Learning from peers | 3 | Two and a half hours |
| 6.  Webbing it | 6 and 7 | Two hours |
| 7.  Winding up | Evaluation and closing | One and a half hours |

# Target participants

The training targets individuals who work in science, technology and innovation issues across different sectors. Participants need not to have prior experience or formal training in communications and partner engagement, although it may be useful. Participants can range from mid to senior level managers. A group of 25 to 30 participants is an ideal size for two to three facilitators to effectively manage discussions and group work. We recommend no more than 30 participants at a time.

# Learning objectives and outcomes

The training workshop is designed to achieve the following learning objectives:

- A better understanding of the range of activities that can be undertaken for strategic communication with the private sector
- A better understanding of how engagement with private sector fosters knowledge exchange and approaches to embed it in organizational strategy.
- Better understanding on how to assess organizational skills and resources and establish priority areas for improvement in communication
- Better understanding on how to use online platforms to facilitate collaboration with the private sector.
- Ability to develop organizational strategic communication implementation plans.
- Work through a structured approach towards organizational communication strategy.

At the end of the workshop, participants will have developed draft strategic communications implementation plans for discussion, completion and implementation.

# Training Module

This training workshop should be delivered through a mix of methods including PowerPoint presentations, group discussions and exercises, case studies/examples, plenary discussions and individual activities such as self-reflection and tests. Flip charts and index cards can be used to record emerging discussion points. The training contents are distributed over seven units:

## Unit 1: Introduction to strategic communication

The unit demonstrates the importance of linking communication to organizational goals and objectives. It describes why it is essential to understand your target audience, their interests, their spread, and accessibility. This unit further describes how to implement communications with the private sector as a process rather than a one-off activity. A key learning outcome is enhanced participants' understanding of what strategic communication entails, its essential components and why it is fundamental in supporting partnerships and collaborations.

## Unit 2: Developing a suitable environment for leading and facilitating strategic communication

This unit provides details on what is needed to enable strategic communication and engagement. These include supportive environments, leadership, and friendly culture. It also considers the real and potential benefits of strategic communications as well as identifying opportunities, risks, and costs. The unit outlines the main challenges to strategic communication and engagement and how to overcome them and to communicate its value to others. A key learning outcome is enhanced understanding and appreciation of the existing and required structures that are key to effective strategic communications and engagement.

## Unit 3: Designing appropriate strategic communication approaches

This unit covers approaches to strategic communication and engagement including planning for strategic communication and engagement of private sector; identifying the plan of action required, and linking to institutional vision, mission, goals and overall objectives. The unit also focuses on how and why participants should identify activities in the organization, where communication supports or can support organizational objectives and increase their engagement with the private sector.

The unit covers the process and stages of developing a strategic communication and engagement strategy. By the end of this unit, participants will be equipped to formulate an action plan including 'quick win' communication activities in their organization.

# Unit 4: Tracking strategic communication activities and embedding learning in the overall project/institutional focus

This unit will enable participants to describe the relationship between communication and monitoring, evaluation and learning (MEL) and the different tools they can use to measure the impact of communication such as online reach, impressions, feedback from meetings, etc.

By the end of this unit, participants will value the importance of embedding communication in the organizational plans and activities. They will also have the ability to describe a model of organizational communication to support learning and how to establish a feedback loop; that is, how and why they should make their communications a two-way street.

# Unit 5: Understanding digital publishing and social media

This unit covers the different tools and online platforms that can be used to build more collaborative internal workspaces and initiate a shared vision with actors such as the private sector. This unit will also cover the key challenges that can hinder online/ offline collaboration and how to address them. By the end of the unit, a key learning outcome is the participants' understanding of the role of structured communication in supporting networks and stakeholder working groups that involve the private sector.

# Unit 6:Harvesting and capturing feedback

This unit focuses on harvesting and capturing of knowledge. It provides an overview of innovative ways, methods, and tools to harvest and capture successes and failures, including the use of web analytics to support documentation of lessons learned and good practices. The unit will also focus on examples of web content creation in the development context.

**"**

**To ensure maximum participation and that the training responds to participants' needs and priorities, a pre-training assessment should be conducted at least one month before the training workshop.**

**"**

# THE FACILITATOR'S GUIDE

## PART

# 2

Facilitation skills are essential for this training process. The training can be delivered by two to three facilitators who need to work closely together

# Introduction

This training is meant to be interactive and highly participatory. Sessions are designed to maximize discussions and engagement. Some of the units may take longer than anticipated. Facilitators should be flexible and willing to adjust according to the needs, interests, priorities, or background knowledge of those attending the workshop. At the same time, it is important to keep a pace that ensures all material will be covered during the workshop.

Facilitation skills are essential for this training process. The training can be delivered by two to three facilitators who need to work closely together, before, during and after the workshop. It is recommended that no more than three facilitators should deliver the workshop. The workshop team should ideally include a lead facilitator and a co-facilitator who should have experience in group facilitation and communication strategy development.

For effective co-facilitation, the following should be adhered to:

- Assign sessions that are a good match with each other's talents, knowledge, and background
- It is recommended that when one is facilitating the other should assist in different ways such as recording on flip charts and timekeeping.
- Establish cues to use during presentations to subtly communicate feedback among yourselves

# Pre-training assessment

To ensure maximum participation and that the training responds to participants' needs and priorities, a pre-training assessment should be conducted at least one month before the training workshop. The assessment should gauge participants experience in strategic communication and engagement. It should cover areas such as (i) formal or on-the-job-training, (ii) frequency and mode of engagement with the private sector, (iii) significance of strategic communication and engagement with the private sector, (iv) topics of interest and (v)extent of social media use for official communication. A sample pre-training assessment questionnaire is included as Annex 1.

The results of this assesement should be analysed and presented to the participants at the begining of the training. The findings should further inform the approach and areas of emphasis.

# Materials needed for the training workshop

- Ball of Wool
- Bell
- Masking Tape
- Post Stick Notes (different colours)
- Coloured index cards
- Flip Chart Paper
- Flip Chart Pens (Enough for each small group)
- PowerPoint Projector and Laptop
- Pointer

# Room Layout

The room should be large, comfortable and welcoming with sufficient lighting. Seating arrangement should include round tables of a maximum of six participants each. Plenty of space should be reserved for an exercise corner, where participants can engage in the various interactive exercises. (see figure 1 below for suggested room setup).
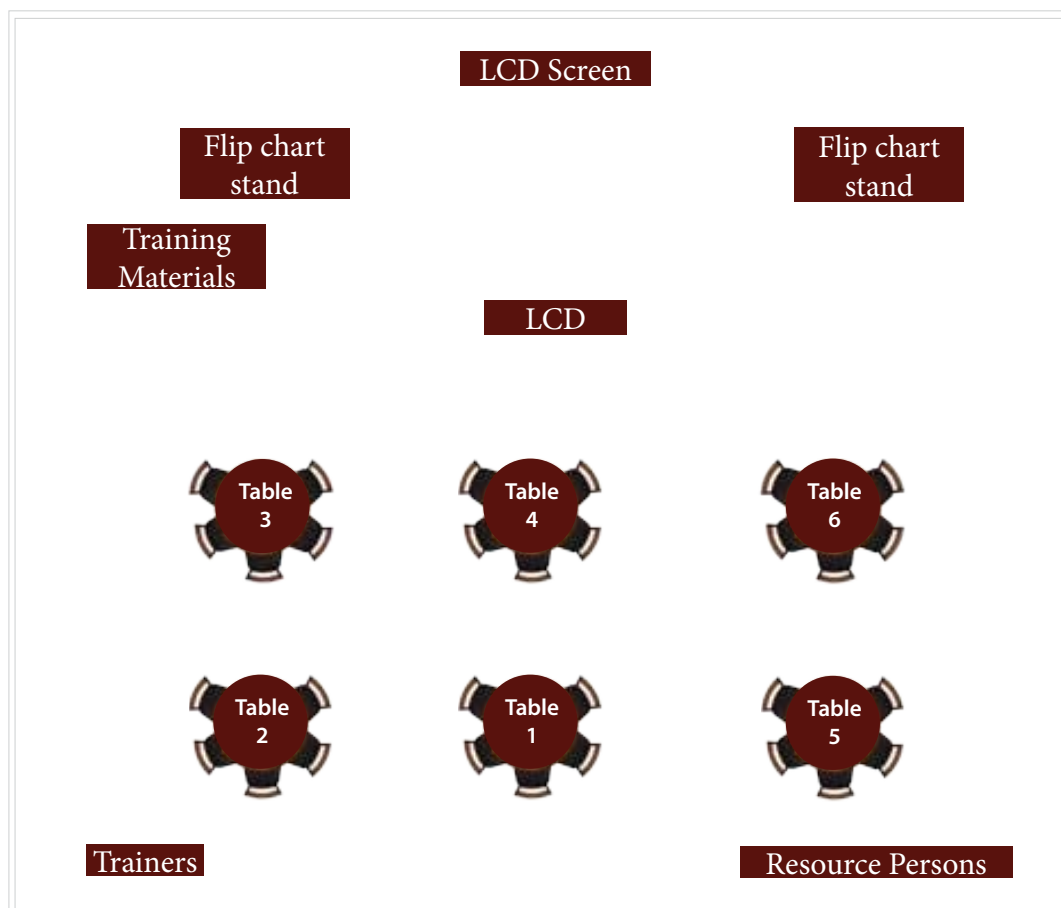


Figure 1: Suggested room set-up

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We suggest the following checklist to guide the setting up of the training room:

- One well-lit and ventilated room that can accommodate approximately 50 Pax.
- Large enough tables (preferably round) of 5-6 persons each moon-shape set up – (If roundtables are not available, we can improvise with rectangle ones)
- Adequate space between tables for ease of movement by participants and facilitators.
- No pillars or columns in the room to obstruct the view of participants.
- Adequate wall space to create a gallery for index cards and sticky notes.
- LCD Projector/Pointer (pre-tested).
- Power extension cables and adapters for laptop users
- Power backup in case of power failure/blackout.

It is critical that the facilitators/trainers have access to the training room the day before the training begins to set up, test equipment, and solve any challenge that might occur well in advance of the start of the training

# Pre-training Planning and Scheduling

Planning should begin several months before the workshop. The following schedule is a suggested guideline:

| Timeline | Task |
|---|---|
| Two months before | • Assemble the training team. These should be experts with the relevant training/experience in the field. They may or may not have worked together previously. It is important to give enough time for team and trust building<br><br>• Collate training materials including manual, PowerPoint slides<br><br>• Discuss the training approach, expectations, and post-training activities. The training team should agree on the division of roles/responsibilities, deliverables, and timelines.<br><br>• Produce a working agenda. Discuss and agree on administrative matters such as contracting, timelines, etc. |
| One month before | • Administer pre-training assessement. This is preferably done using online tools such as survey monkey.<br><br>• Confirm venue booking/room requirements<br><br>• Affirm roles and responsibilities among facilitators |
| Two weeks before | • Discuss how to organize group discussions and group exercises including case studies and relevant examples.<br><br>• Share agenda with participants and seek their inputs/comments.<br><br>• Compile the final list of expected participants including their affiliations and designations<br><br>• Share selected training discussion questions with participants.<br><br>• Review and adjust agenda as informed by pre-workshop assessment and participant feedback<br><br>• Finalize training materials, assignment questions, etc.<br><br>• Confirm venue and logistics<br><br>• Send out a logistics note with relevant details |

| One week before | • Select final case studies and make sufficient copies |
| | • Print materials and assemble participant packets containing relevant information products including course description, workbook, etc. |
| | • Print training and facilitation materials |

| One day before | • Prepare meeting room and organize seating arrangement |
| | • Produce registration/ sign-in sheet |
| | • Print daily evaluation forms |

# Overview of the program

The training workshop is designed to take three days. A detailed agenda is included in Annex 2. It is essential that the specific objectives and agenda are covered in each of the three days. A brief overview is provided below:

On day one, the fundamentals of strategic communication are introduced and a few essential activities that should be completed include:

- Introduction of the program and facilitators
- Introduction of participants
- Documentation of expectations and fears
- Discussion of ground rules
- Evaluation of the day

From beginning the facilitators begin to get a "feel" of how the training is progressing, what potential issues they might face and how participants are interacting with each other and with them. The facilitators should always be aware of these training dynamics as they may need to change the style or content of the training appropriately. By the end of day one, the facilitators should have a clear idea on:

- the levels and experience of the group
- areas of the training that may require more focus and time
- who are the more challenging, more active, more passive members of the group
- How they may need to adapt the training approach or training content to ensure inclusiveness and that everyone gains as much as possible from the training

The second day of the training workshop begins with a recap of day one's content. Feedback from the evaluation exercise is provided. Facilitators may opt to engage volunteers from the participants to lead the recap and evaluation. If so, these should be agreed at the end of day one and expectations discussed. It is highly recommended that adjustments are made as necessary and appropriate, based on participants' feedback. Day two also focuses on more practical exercises including group discussions and plenary discussions. Participants begin working on their communication strategies and implementation plans.

On the third day, the focus is on finalizing the communication strategies and implementation plans. Participants work in groups with the facilitators to discuss key components of their implementation plans and strategies. Further on-site support is considered and agreed between facilitators and participants.
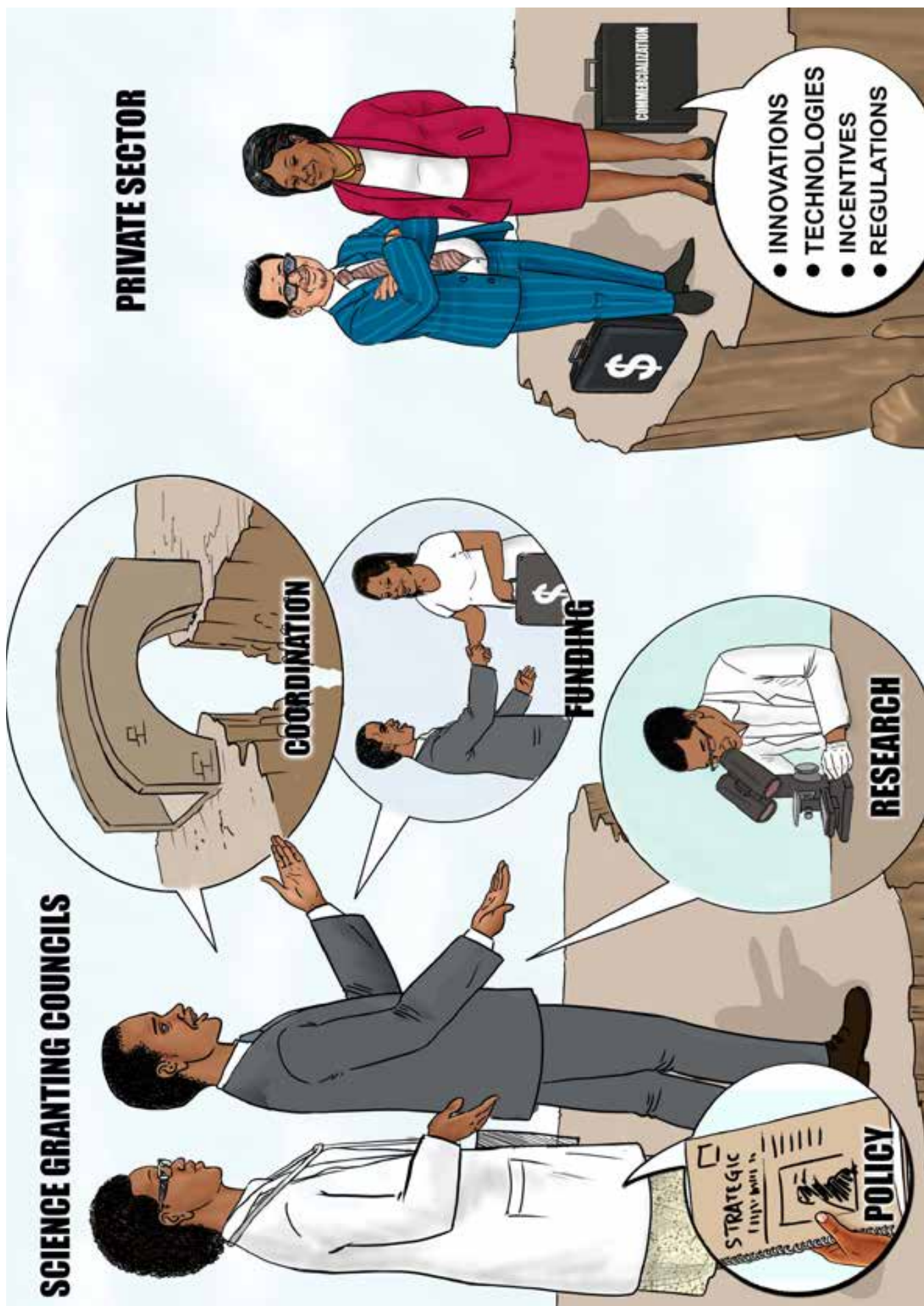
# DAY ONE

# Session 1: Getting Started

**Overview:** This session involves facilitator-led activities with extensive participant interactions. It should be kept simple and within the schedule. The focus is on welcoming participants and inculcating a friendly atmosphere that will allow the participants to settle in and enjoy the 'learning journey.' It is estimated to take one hour and forty-five minutes. During this session, the pre-training assessment results are presented and discussed, and the first unit is introduced.

**Purpose:** The purpose of this session is to introduce the participants, the training program, modules, approach, and expectations. It also serves to establish enabling group dynamics such as respect, trust, and openness. By getting acquainted with one another, sharing expectations, and setting ground rules, participants are expected to be positively engaged in the workshop from the onset.

**Objectives and outcomes:** By the end of this session, participants will have:
- Become acquainted with one another
- Highlighted their fears and concerns
- Related their expectations and fears to workshop objectives
- Set up and agreed on ground rules
- Discussed the results/finding of the pre-training assessement

**Methodology:**
PowerPoint presentation; individual exercises; plennary discussions

**Materials:**
Ball of wool; projector and PowerPoint slides; flip chart paper; colored index cards; markers and masking tape

# Step 1: Official welcome and opening address

It is recommended that the workshop begins with a welcome address, preferably from the host institution. In cases where there is no specific host institution, an expert in partnerships development, policy development or development communications can deliver an opening address. This is a crucial activity that sets the stage for the three days. The address should reiterate the importance of strategic communication and engagement with the private sector. It should highlight why partnership and trust building is key to knowledge sharing.

# Step 2: Introduction of participants

A participatory mapping exercise, designed to take 30 minutes, is recommended for introductions for large national or regional training workshops. Mapping is an excellent way of finding out which participants come from which organizations and their geographical spread. This is key to understanding language, political and cultural sensitivities that the trainers should consider.

Ask participants to draw out the shape of a map using a ball of wool on the floor.

*Activity 1*

> This could be a map of the whole of Africa. All participants should be encouraged to participate in drawing the map.
>
> After everyone has agreed on the shape of the map, ask participants to stand in the area of the map where their work organization is based. Request each of the participants to provide the following information:
>   1. The name of the participant
>   2. The name of their organization
>   3. Their role in the organization
>
> Work your way around the map asking each participant, in turn, to speak (on the three areas) and ensuring other participants listen.

**Purpose of Training Workshop**

By the end of the three-day training, participants will have:

- A better understanding of how engagement with private sector applies in their work with means and approaches to embedding it
- Better understanding on how to assess organizational skills and resources and establish priority areas for improvement in communication
- Better understanding on how to use online platforms to facilitate collaboration
- Ability to work through a structured approach towards organizational communication strategy.
- Ability to develop organizational strategic communication implementation plans.

The facilitator should highlight that the objective is to improve the capacity of African Science Granting Councils to communicate with the private sector. The training aims to expose the participants to the fundamentals of strategic communication with the private sector and enable them to initiate or lead communication activities within their network(s) and organization.

It is recommended that this slide is printed out and displayed on a wall in the workshop room.

The facilitator should emphasize that each participant is expected to produce a one-year communication implementation plan at the end of the three-day workshop.

## Step 3: Documenting expectations and fears

Designed as a facilitator-led individual exercise, this section is expected to take 15 minutes and is critical to help manage expectations over the three days.

*Activity 2*

- Provide two coloured index cards to each participant. Ask them to write their expectations on an index card of a specific colour (e.g green) and their fears on a different coloured card (e.g red) - 5 minutes.
- Once they have finished, request participants to post their cards on the wall section clearly labelled for this.
- Allocate 10 minutes to go through all the responses and cluster the responses according to recurring themes or similar interest areas.
- These cards should be displayed on the wall for the rest of the workshop period, and with a plan to refer to them at the end of the workshop.
- As part of the final evaluation participants should discuss the extent to which their fears have been alleviated and expectations met. Recommendations for future training should be discussed.

## Step 4: Agreeing on ground rules

It is imperative that all workshop participants including the facilitators have a common understanding of the code of conduct. Spend 10 minutes on discussing issues such as mobile phone etiquettes, use of laptops, respect for other peoples' contributions and opinions, and encourage full participation of trainees. It is recommended that participants should not use their laptops during the sessions, except where certain representatives are required to document their discussion points.

# Session 2: Settling In

**Session overview:** This is an intensive highly participatory session that involves brainstorming, an interactive lecture and group tasks. This module aims to familiarize the participants with the importance of structured engagement of the private sector. It is estimated to take five hours.

Purpose: The purpose of session two is to emphasize the need to approach communication 'as a means' to an end and not as the end. Participants begin engaging in group exercises and identifying areas of synergy among them. Objectives and outcomes: By the end of this session, participants will have:

- Established a rapport with each other and with the facilitators
- Appreciated the importance of the pre-training assessment
- Understood the starting point in implementing strategic communication and engagement
- Understood their role in facilitating strategic communication and engagement of the private sector
- A bird's eye view of what strategic communication entails

Methodology
PowerPoint presentation; interactive lecture; group exercises

Materials
Projector and PowerPoint slides; flip chart paper; colored index cards; markers and masking tape

## Step 1: Discussion of the pre-training assessment results

*Interactive lecture*

In about 30 minutes, using Powerpoint slides and a projector, the facilitator presents a summarized report of the pre-assessment results. This serves as an introduction to the training topics and highlights those that will receive more emphasis. It is vital for the participants to know the outcome of their response to the survey. Participants will also appreciate the importance of the pre-training exercise.

Allocating sufficient time for questions from the participants is important. It is recommended that the facilitator engages the participants in a drawing-out discussion to contextualize the responses to the assessment. At this point, remember to highlight how the assessment results influenced the curriculum. Repeat the overview of day one's agenda as you introduce unit 1.

# UNIT 1:Introduction to strategic communication
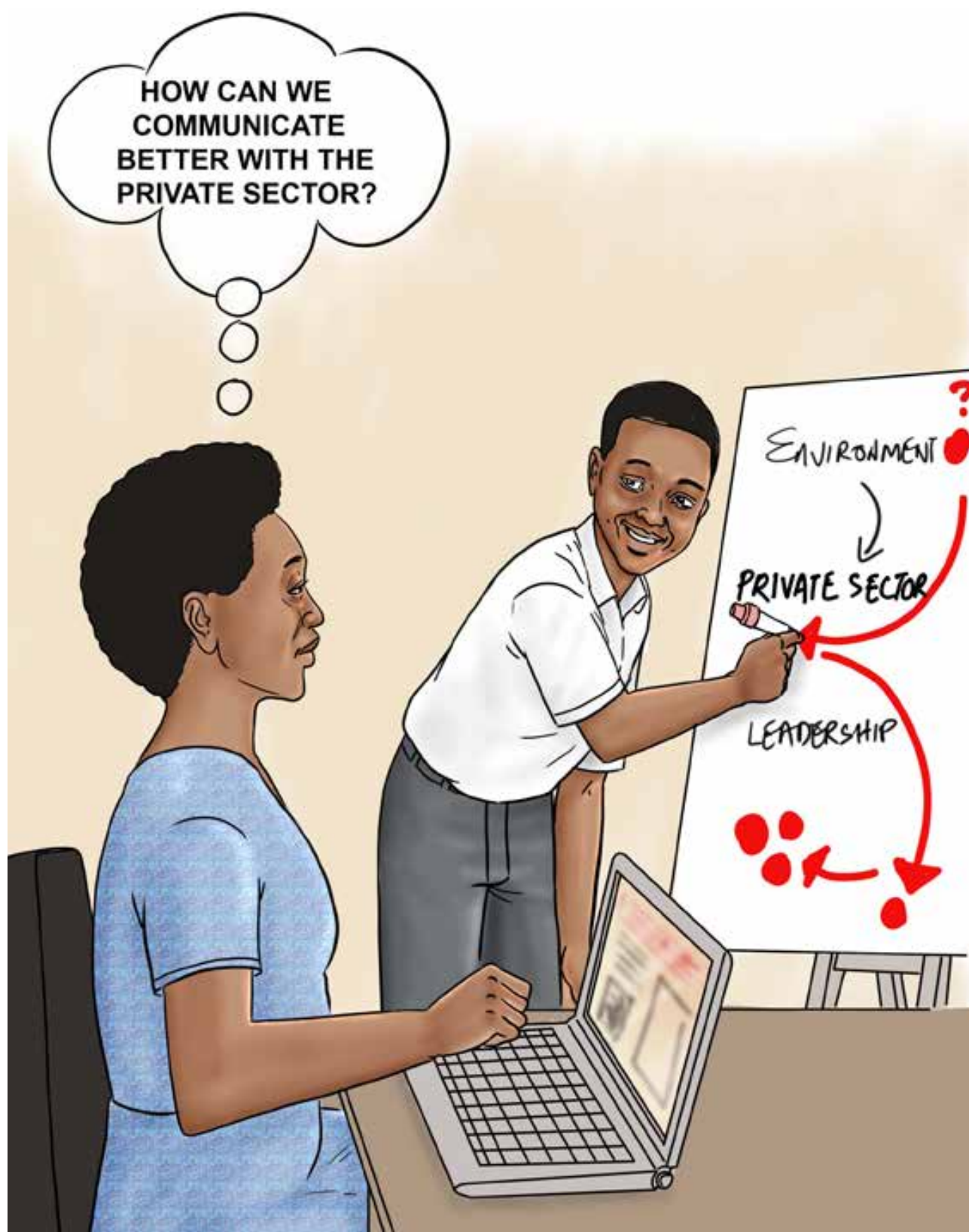
Why is it fundamental that science granting councils strategically engage and communicate with other actors including the private sector, the academia (and other research institutions) the media and other development partners?

This unit is meant to give a bird's eye view of what strategic communication entails. Delivery of this unit is designed to take two and a half hours. The facilitator will use a Powerpoint presentation to give an interactive lecture. Participants will also be engaged in an individual exercise and a group exercise.

Given its dense nature, delivery of this unit has been split into two. Component one (one and a half hours) is dedicated to introducing the principles of strategic communication, the planning, and the process. The second component (one hour) focuses on audience mapping and takes the participants through the process of designing a strategy to approach the target audience.

**Objectives:** By the end of this unit, participants will understand what strategic communication entails, its essential components and why it is fundamental. Participants will also be introduced to the different approaches that will lead to strategic communication. This unit will describe how and why it is crucial to implement communications with the private sector as a process rather than a one-off activity.

# Component 1 - Introducing Strategic Communication

## Step 2: Interactive lecture

For one hour and twenty minutes, using PowerPoint slides, the facilitator leads a structured discussion on the following:

- The building blocks of strategic communication
- How to identify your entry point in strategic communication for your organization
- How to identify and map your audiences
- How to structure your message for a specific audience
- How to determine which channel to use for communication

## Step 3: Individual exercise one: my role in communications

Request the participants to reflect and answer the following questions:

- "What are some of my good communication practices?" – write on **green cards**
- "What could I improve on?" – write on **pink cards**
- "Where are potential entry-points for communication in my organization or network?" – write on **blue cards**

After ten minutes, request participants to stick their cards on the wall. As the participants proceed for lunch, the facilitators should take about ten minutes to study the responses on the index cards and cluster the common responses or those speaking to a common theme.

During the remaining two and a half days, it will be necessary for the facilitator(s) to keep referring to the practices mentioned here and how they can be leveraged at different points and how to improve on the weak points.

## Step 4: Energizer

It is recommended that an energizer exercise is introduced at this stage. One or several of the participants can lead this exercise. For this, it is necessary to inform them in advance (perhaps as they head out for lunch so that they can prepare). The exercise can be designed to take about five minutes. Energizers are necessary to keep the group engaged and active throughout the workshop.

# Component 2 - Audience Mapping

The second component of unit one focuses on audience mapping. Its delivery is through a brief lecture, an intensive group exercise, and plenary presentations and discussions. It is estimated to take about one and a half hours.

It is critical to take time to go through the participants' evaluation of the day. As you do this, cluster the responses into the broad emerging themes. Take note of participants' views on what should be improved or introduced and act where possible, albeit at a small scale. For example, if participants note that the sessions are too long and intensive, consider adjusting the flow of activities and perhaps introduce short timeout breaks in between. You could also engage them the next morning, during the recap session, by stirring a discussion on what they think can be done to address some of the concerns. The objective here is to make the participants feel that the workshop is indeed a customized learning experience.

Wrap up by reminding the participants about the start time for day two sessions and any other logistical information

## Step 5: Interactive discussion

Using PowerPoint slides and notes, the facilitator, in 10 minutes, introduces audience mapping and why it is a necessary process.

## Step 6: Group exercise

The facilitator then leads the participants in organizing themselves into five groups.
**Facilitator Tip:** Depending on the number of participants, the number of groups can change, but each group should have an equal number of participants):

- Using the count off method, organize participants into five groups. Each participant picks a number between 1 and 5, then all the ones that picked number 1 form group one, all the ones who picked the number 2 form group two, and so on. In groups, request participants to conduct this 30-minute exercise:

- Request participants to record their discussion points on flip charts, using marker pens. In their groups, invite participants to identify the discussion lead and the note-taker.

- After the group discussions, each group representative reports to the rest of the team their discussion points.

- This plenary reporting session is allocated 50 minutes, with ten minutes for each group.

- The facilitator then summaries the discussion points in 5 minutes, to pave way for the second unit.

This exercise is fundamental for setting the stage for the next unit. Participants will identify the different resources that they have at their disposal, which they can use to enhance their communication. They will also appreciate the need to allocate resource and tap into existing networks and partners for engagement with the private sector. This exercise emphasizes the importance of understanding the target audience, their interests, their spread, and accessibility.

# EXERCISE: AUDIENCE MAPPING

**Awareness:** how much does my TA know about this issue

**Motivations/Beliefs:** what motivations or beliefs does my TA hold that are relevant to this topic

**Pain points:** what might prevent them from taking the action we want them to take?

**Influences:** who influences my TA or whose opinion does he/she respect?

**Information:** Where does my decision maker get information from?



Motivations /Beliefs

Awareness

Pain points

Influences

Information

Pick a single PRIMARY TARGET AUDIENCE and draw here

# Powerpoint slides for Unit 1

## STRATEGIC COMMUNICATION



Engaging in **intentional, coordinated, purposeful interaction** and **exchange** of **information**

## PRINCIPLES OF STRATEGIC COMMUNICATION



Building blocks?
- The message (the what and why)
- The audience (the who and where)
- The process and the timing (the how and when)

## THE MESSAGE?



Need to see communication as a means to an end i.e., what is your end goal? What are you trying to change or influence?

You need to be consistent in your messaging and back it with evidence i.e., why is your message critical?

What is our objective and why do we need to communicate with and engage private sector

- ➔ Why are we doing what we do? Is it necessary? What do we need to change?
- ➔Why do we want our target audience to think, feel or act differently? ☐ what is the ask? Establish the big wins vs the small wins- do some happen before others?

## THE AUDIENCE



The private sector is not a homogenous group
- You need to identify the specific actor (s) you are targeting

What do they care about? What are their priorities? Where are they? i.e. what are we asking them (the ask)? Why should they care about this ask? What is in it for them?
- Why should they believe in us? Are there any evidence and endorsements to validate us and our message- the ask. Why has it not happened already?

# THE AUDIENCE

What are the characteristics of their operating environment?

Scale and contextualize our information to the audience i.e. what impact would it have on their context?

Tailor your offering accordingly- know what works and what doesn't;

---

# EXERCISE: AUDIENCE MAPPING
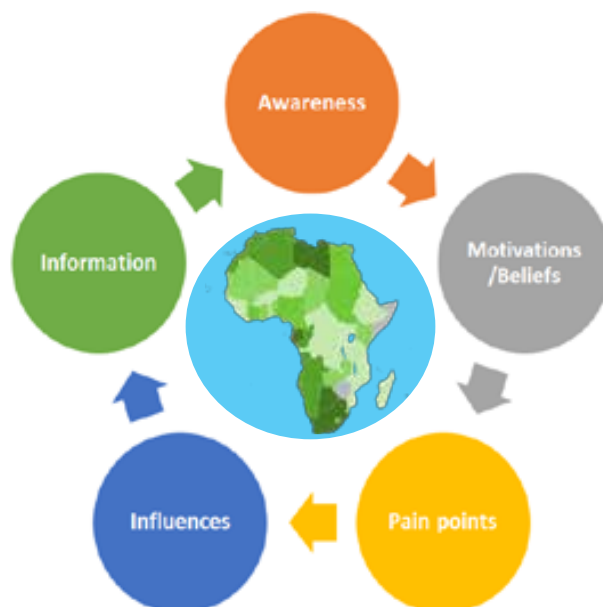


**Awareness:** how much does my TA know about this issue

**Motivations/Beliefs:** what motivations or beliefs does my TA hold that are relevant to this topic

**Pain points:** what might prevent them from taking the action we want them to take?

**Influences:** who influences my TA or whose opinion does he/she respect?

**Information:** Where does my decision maker get information from?

## THE PROCESS

How will you relay your ask to the private sector? When will you do this? What approaches will you use?

At what point or when do you engage? ➔ timing is key!

Look at communications as a system and a process

---

## COMMUNICATIONS AS A SYSTEM AND A PROCESS

Communication with the private sector is not and should not be a "one-off" item (s). Don't think in terms of "this newsletter" or "that e-mail." Think in terms of your entire communications system.

Communications is a process. Communicating with your partners and stakeholders takes time. One e-mail won't make or break your communications with the private sector.

Instead, think of the program holistically… every time you communicate with them you are telling one small part of the big picture story of activities, intentions or future plans.

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# WAIT…. DO WE NEED THIS? WHAT IS MY ROLE?

## INDIVIDUAL EXERCISE– MY ROLE IN COMMUNICATIONS (10 MINUTES)

Reflect on points discussed and answer the following questions:
- "What are some of my good communication practices?" – write on **green cards**
- "What could I improve on?" – write on **pink cards**
- "Where are potential entry-points for communication in my organisation or network?" – write on **yellow cards**

# " This exercise is fundamental for setting the stage for the next unit. Participants will identify the different resources that they have at their disposal, which they can use to enhance their communication. "

# UNIT 2: Developing a suitable environment for leading and facilitating strategic communication

## Step 7: Interactive lecture

In one hour, the facilitator uses the PowerPoint slides to present the discussion points.

## Step 8: Guided plenary discussion

Leading and facilitating strategic communication

This 30-minute exercise seeks to initiate a discussion on how to maximize existing resources for strategic communication and identify steps to take towards implementing strategic communication.

- The facilitator asks the following questions and invites responses and discussions on the responses from the participants:
    - i. Who has the overall responsibility of ensuring the organization communicates and engages strategically with their partners (both existing and potential)?
    - ii. Why do you think this person bears the overall responsibility?
    - iii. What do they require to be successful in this endeavor?
- Record the discussion points on a flip chart in a table structured as below:

| Who? | Why? | What? |
|------|------|-------|
|      |      |       |
|      |      |       |
|      |      |       |

## Step 9: Evaluation and wrap up

After a highly intensive first day of the training workshop, it is critical to offer an opportunity for the participants to provide their views on the workshop so far.

A facilitator-guided individual exercise is recommended for this brief session:

- Provide three coloured sticky notes to all participants. Request them to reflect and individually write on sticky notes of different colours, the following points:
    - o What worked well- on colour A
    - o What could have been better- on colour B
    - o How the approaches/methods should be adjusted- on colour C
- After ten minutes, request them to post the notes on the flip charts clearly labelled accordingly. Spend about 20 minutes discussing the feedback.

# DAY TWO

## Step 1: Recap of day one

Day two begins with a recap of what was covered on day one and a quick overview of the day's agenda for about 30 minutes.

The facilitators engage the participants in a discussion of what stood out for them the previous day; ask them to share their key outcomes on the table, write them down on cards and stick them on the wall under the following categories: Very important; empowering; useful.

The facilitators should also highlight their feedback to the participants' evaluation and note the adjustments (if any) that have been made while also providing necessary explanations to any recommendations that are not possible to implement immediately or the reasons behind specific actions/approaches used in training.

We recommend that this item is accorded utmost attention, to ensure that the participants (most of whom may already be seasoned experts in their field) appreciate the extent of this training's customization

The facilitator may consider gathering the participants around the flip charts (or wall) that contains the responses from the evaluation for this feedback session. You could also engage the participants in a quick mood check exercise to get a feel of their expectations. You can do this by just asking them to state how they feel this morning *(responses may include: I am anxious this morning; I am expectant; I am cautious; etc.)* These could give the facilitators a clue about the general mood of the audience.

## Step 2: Program overview and objective of sessions

Using a PowerPoint slide, the lead facilitator of the day takes the participants through the roadmap that describes the program of the day, expected breakout sessions and the expected outcomes.

# Session Three: Learning by Action

**Session overview:** Session three delves into the details of appropriate strategies to support the organizational objectives. It covers unit three of the curriculum and is one of the most intensive sessions that includes several immersive group exercises, interactive lectures, and plenary discussions. It is estimated to take six hours

**Purpose:** It introduces participants to the process and stages of developing a strategic communication and engagement strategy. Participants are taken through a practical process of developing one component of a communication strategy: a communication implementation plan

**Objectives and outcomes:** By the end of this session;

- Participants will be equipped to formulate an action plan including 'quick win' communication activities in their organization
- Participants will produce draft communication implementation plans which they should take with them for piloting in their institution

**Methodology**

PowerPoint presentation; interactive lecture; group exercises; case studies

**Materials**

Select organization strategy documents; Projector and PowerPoint slides; flip chart paper; colored index cards; markers and masking tape

# Powerpoint slides for Unit 2

## A SUITABLE ENVIRONMENT FOR STRATEGIC COMMUNICATION
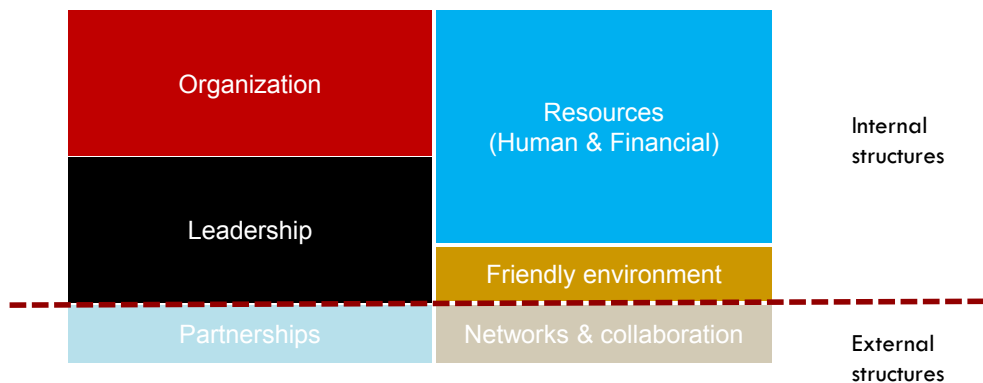
## REQUIREMENTS FOR STRATEGIC COMMUNICATION – ORGANIZATION

- Type of organization
- History/Reputation
- Bureaucracy/red tape
- Team player – are collaborations your cup of tea
- Donor relationships

# REQUIREMENTS FOR STRATEGIC COMMUNICATION – LEADERSHIP

- Understanding and appreciation of Strategic Communication & Engagement
- Vision and strategic
- Networks
- Great people management skills
- Fantastic listener

# REQUIREMENTS FOR STRATEGIC COMMUNICATION – RESOURCES

- Human
  *staffing
  *skills/capacity
  *talent
  *training opportunities
- Financial

## REQUIREMENTS FOR STRATEGIC COMMUNICATION – FRIENDLY CULTURE

- What do we mean when we talk about a friendly culture?
- What does this look like
- Why is this important
- How do we maintain it?



Is your Company Culture Friendly

## A CASE FOR COMMUNICATION AND ITS REAL AND POTENTIAL BENEFITS

Increases funding opportunities

Platform for partnership and collaboration

Buy-in

Role in policy making and good will

setting agendas

# STRATEGIC PLANNING FOR COMMUNICATION WITH THE PRIVATE SECTOR

Where does communication lie in the organizational process

Lets think about networks and the potential levers

# OPPORTUNITIES AND COSTS OF STRATEGIC COMMUNICATION & ENGAGEMENT

**Opportunities**
Barriers as opportunities i.e. lack of **time**, problems with **logistics**, **costs**, lack of **urgency** and lack of **awareness**

Identifying opportunities/strategic **entry points** in decision making, funding opportunities, the real local needs and skills required, potential for industry and markets

**Promote all the benefits** that result from communication & engagement with the private sector

**Reduce** the time when a target audience/private sector has to **adopt a desired action** - any significant time gap can disrupt this connection

Focus communications and engagement on **midpoint milestones and rewards**

**Costs**
communication can range anywhere from it being **creative and affordable** to applying **unique forms** of engagement that require **huge amounts of money**

# THE COMMUNICATION CONTINUUM
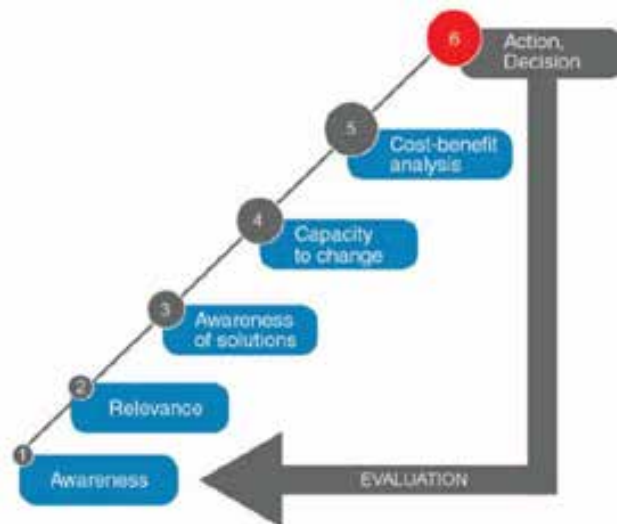
"

# The facilitator may consider gathering the participants around the flip charts (or wall) that contains the responses from the evaluation for this feedback session.

"

# UNIT 3: Designing appropriate strategic communication approaches
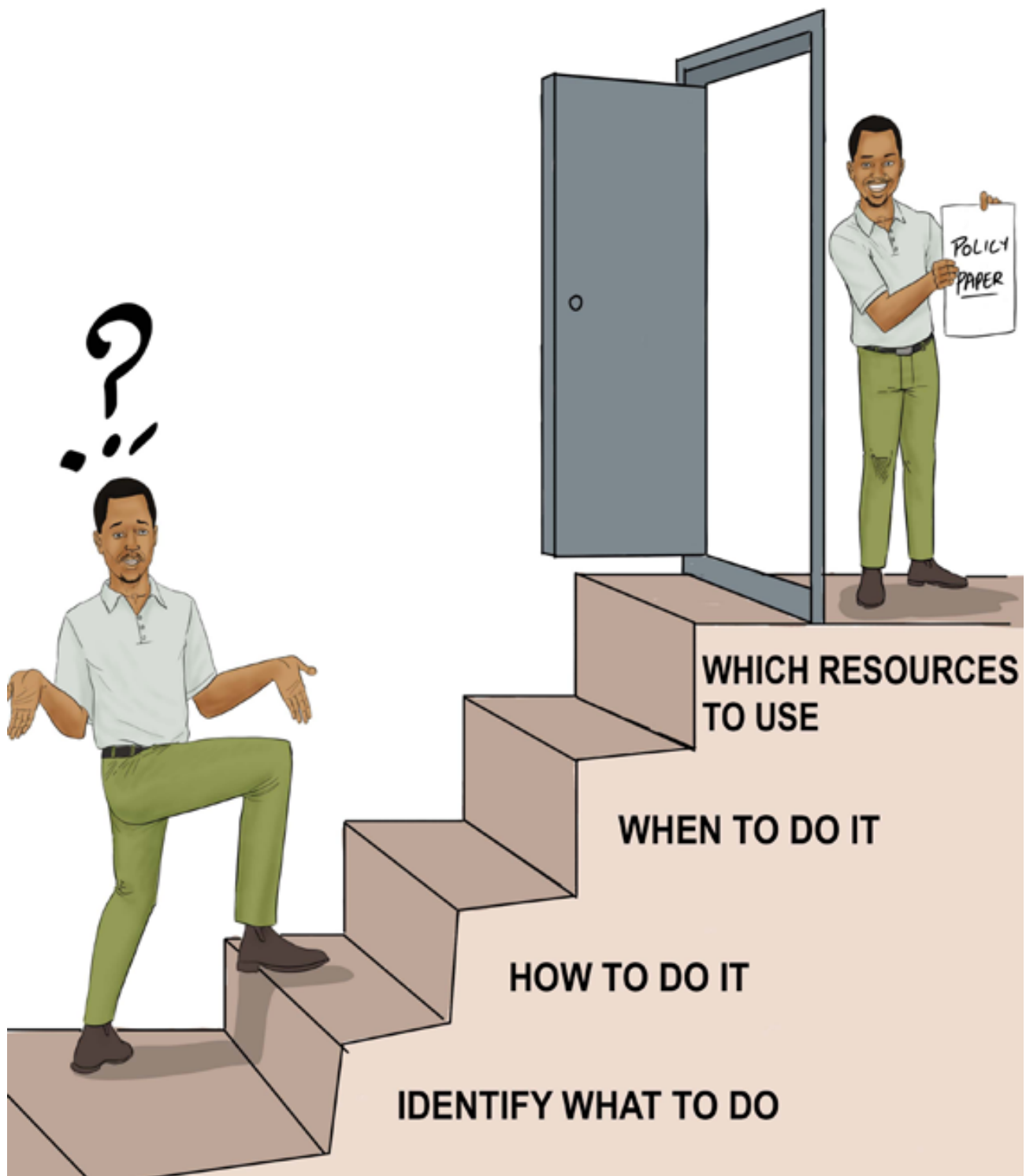
This unit is the backbone of the training workshop and takes most of the hours. Its delivery has been broken down into three components. The unit introduces the critical steps that should be followed for enhanced communication and engagement with the private sector and what is needed to produce a communications strategy.

## Why a communication strategy?

For one to employ appropriate approaches in communicating and engaging with the private sector, a structured guide towards a set goal is required. A communications strategy is a tool that outlines how to systematically implement your identified communication approaches based on your needs, resources (including time, skills, finances) and overall goal.

A communications strategy is an adaptable plan of action that is and should be updated as and when required. It stipulates the objectives of your communication approaches, the intended outcome, the messaging and type of packaging for the messages, the activities/tasks to carry out for each message and/or approach, the channels to be use to convey the messaging, the target audiences, the timeframe within which each activity must be carried out, the resources required, an implementation plan and a methodology towards monitoring and evaluating your communication strategy.

To arrive at an appropriate communications strategy, one needs to follow several steps that involve answering several questions:

- What is the main message and what is its communication supposed to achieve and by when?
- For what purpose, i.e. why is it necessary?
- How do you intend to package your message?
- Which audiences are your target and where are they located?
- Which channels do you need to use to reach them? What do they care about?
- When do you need to communicate your message?
- What resources do you have?
- Whom do you need to convey your message?

"

**It is imperative that participants understand and appreciate strategic communication as an intentional practice that should be aligned to the organizational objectives.**

"

# Component One of Unit 3

## Step 3: Interactive lecture

Using PowerPoint slides, the facilitator engages the participants in an interactive talk over a period of one hour. Emphasize on the process of planning for strategic communication and engagement of private sector; how to identify the kind of a strategy you require, and how to link the strategy to institutional vision, mission, goals and overall objectives.

## Step 4: Exercise- identifying entry points for private sector and communication in the organizational focus

The first exercise in this unit seeks to demonstrate the entry points for private sector engagement and how communication can facilitate this engagement. Figure 2 below illustrates this exercise.

- Using the count off method, organize participants into new groups consisting of an equal number of participants. It is advisable to limit each group to a maximum of five people. Request participants to identify their group leader and rapporteur who will present their discussion points to the rest of the team.

- Distribute strategy documents for five organizations. These strategy document should reflect the types of organizations that the participants come from and should be distributed one week before the training commences.

- Request the participants to read the documents and identify the organization's mission, vision, and goals; the organization's primary activities and organizations' resources.

- Based on the organization's mission, vision and goals, request participants to discuss the following and record on flipcharts:

  o At what point is private sector engagement critical and for what role?

  o What role can communication play to support this engagement and how?

**HOW?**

Mission
Vision
Objectives/Goals

Primary activities | Why your organisation / institution exists

Plan- implementation and monitoring
Budget
Time
Staff
Actors/ Partners

Where does the private sector come in?

What role are they required to play?

At what point does communication come in and how?

After the group discussions, each group is allocated ten minutes to present their discussions to the rest of the team and for plenary reviews.

# Component Two of Unit 3

## Step 5: Interactive lecture

It is imperative that participants understand and appreciate strategic communication as an intentional practice that should be aligned to the organizational objectives. This way, they will comprehend how strategic communication is a means to an end, rather than the end.

Through a 30-minute interactive lecture, the facilitator emphasizes the need for and how to identify communication objectives. This point can be supported using case studies and examples where prompt strategic communication and engagement has been successful. In Annex 4 we have provided references to some case studies that can be used. It is important also to allow the participants to share any examples from their work experiences

## Step 6: Exercise

The second exercise in this unit emphasizes and demonstrates the importance of linking communication to organizational objectives and how this can be done. To illustrate this point, an exercise has been designed to enable the participants to deduce how communications can facilitate an organization's success. This exercise requires the participants to continue working in the groups formed in part one of this unit.
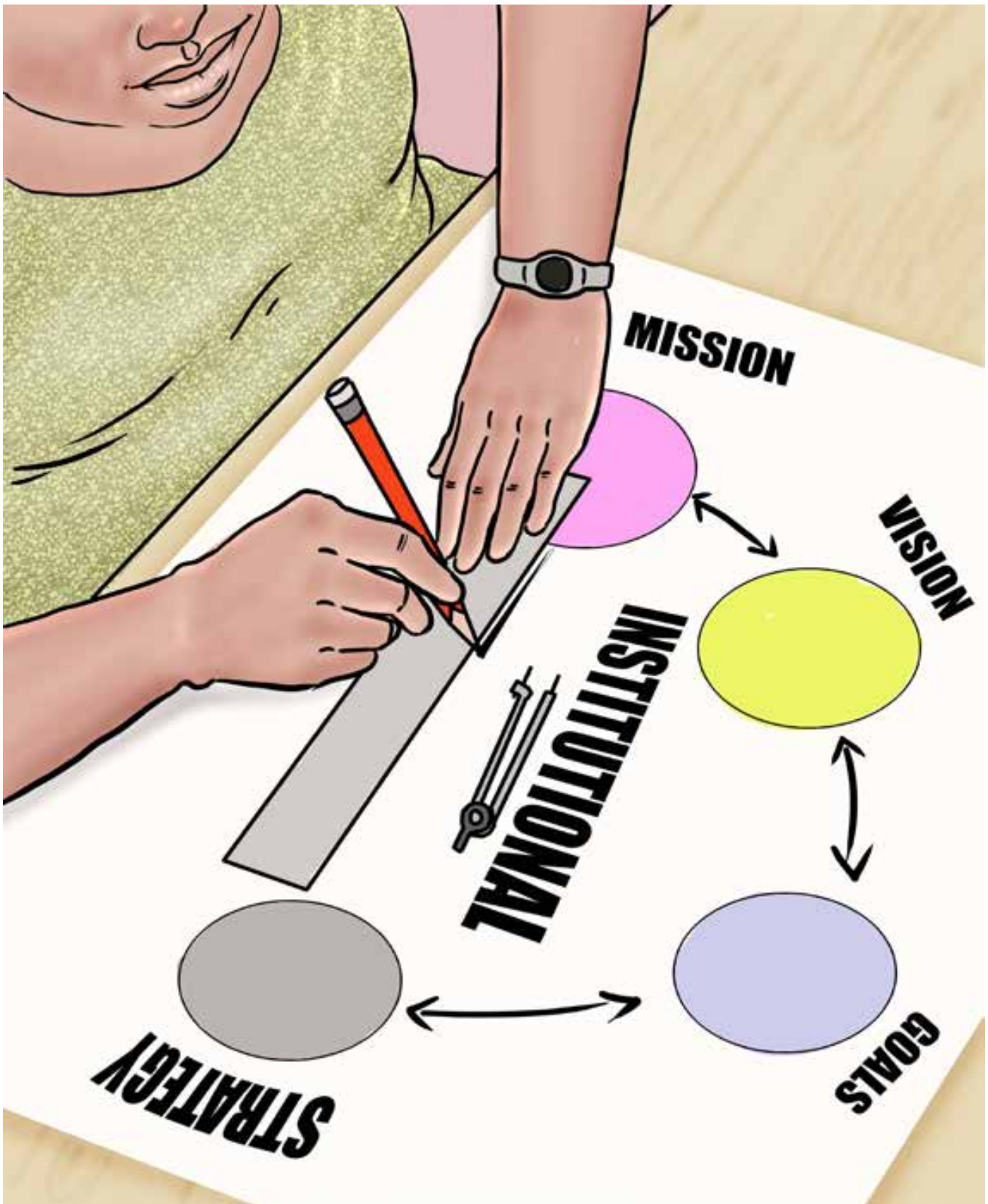
**Strategy Exercise:** Linking institutional objectives to communication objectives (80 minutes)

Based on discussion in previous group exercise, identify two potential communication objectives, goals or priorities to address the organsiation's objectives (30 minutes)

Facilitator will assist/respond where needed

Write your discussion points on flip charts

Present your discussion to the rest of the participants (50 minutes- 10 minutes per group)

# Component Three Of Unit 3

## Step 7: Interactive lecture

At this point, the facilitator has already introduced the different components of a communications strategy. It is important to emphasize that it is not in all cases that a comprehensive strategy document for communications will be required, depending on the scale of operations, duration of project and resources, however, a plan towards implementing strategic communications is necessary. Thus, the facilitator now introduces a communications implementation plan.

Through an interactive 30-minute lecture using Powerpoint slides, the facilitator engages the participants in a discussion that leads to the third exercise of this unit, which requires participants to work in groups organized according to the organizations represented.

Remember to emphasize that this training workshop is designed to help them solve an identified need that requires strategic communication with and engagement of private sector. As such, the participants should now begin to make firm commitments on how they think they can implement the knowledge gained.

# Step 8: Exercise -using communication objectives to produce implementation plans

This exercise is designed to take one and a half hours. Instructions to guide the exercise:

Instruct the participants to use the following structure for the implementation plan:

| The strategic objective of the organization | | | | | |
|---|---|---|---|---|---|
| Communication objective | | | | | |
| Primary target audience | | | | | |
| Specific goals for reaching the audience | Commu-nication activities | When? | Key messages | Person responsible | Expected outcome/what success looks like |

The results of this group exercises will be presented at a later stage of the training, as captured in session five

# Power point slides for unit 3

## WHERE TO START?



- What are your objectives?
- How and where does private sector come in?
- What structures are already in place?
- What barriers are you facing?
- Do you have a budget?
- Staff?
- Expertise?

## FIX INTERNAL COMMUNICATIONS FIRST! - FOR SMOOTH EXTERNAL COMMUNICATIONS



Is as important as external communication (if not more than)

Start from the inside out- need to speak in one voice; need coordinated efforts;
- How is the internal communication process? Flow of information? What tools do you use?

Consider:
- Regular team meetings- brown bag lunches; brief weekly meeting; online platforms to foster collaboration- yammer, wiki etc.- will be covered in unit 5

# EXTERNAL COMMUNICATION



Communication is broad; strategic communication is intentional, coordinated and purposeful ➔ need to identify where to focus – what is your communication objective? should be aligned to your organizational objectives

# LINKING TO ORGANIZATIONAL OBJECTIVES

Refer to the most recent organizational strategy or strategic planning

Identify the objectives that require private sector engagement

Identify those that can be supported by creating, sharing and applying knowledge- most often than not, it's all!

Align the communication objectives to the strategic objectives

# HOW?

Mission
Vision
Objectives/Goals

Primary activities | Why your organisation / institution exists

Plan- implementation and monitoring
Budget
Time
Staff
Actors/ Partners

Where does the private sector come in?

What role are they required to play?

At what point does communication come in and how?

---

## STRATEGY EXERCISE: LINKING INSTITUTIONAL OBJECTIVES TO COMMUNICATION OBJECTIVES (45 MINUTES)

In table groups, look at the provided strategy document; Identify mission/ vision statement and primary activity. Indicate where communication is crucial

In 25 minutes, think and discuss about how communication processes can support their missions and objectives

**Identify where communication intervenes** in the primary activities.

**Identify where private sector engagement** is critical for their functions and objectives

Come up with **two potential communication objectives,** goals or priorities to address the strategic objectives

Trainer assist/ respond where needed.

Write your discussion points on flip charts

Posters will be stuck to the wall.

Plenary presentation- 15 minutes (5 minutes per group)

Wrap up- 5 minutes

# WHAT NEXT?

## SELECT YOUR APPROACH



Different tools to use; what tool and why? Determined by several factors:

- Accessibility of tool
- What audience? – specific company or general private sector?
- Size of audience
- Presence of audience? Where are they?
- Budget
- Expertise of both your internal team as well as that of target audience
- Objective and duration of use

## CONTINUOUS ENGAGEMENT



Establish a relationship with audience
- Create a surround around your story- sustain your story, let it play out in the news cycle

Not too much/ many 'asks' at once - focus on an issue/story at a time

Build the echo chamber and sustain the sound for as long as possible- i.e. reach out on all platforms; depending on message and audience

# WHAT IS A COMMUNICATIONS STRATEGY?
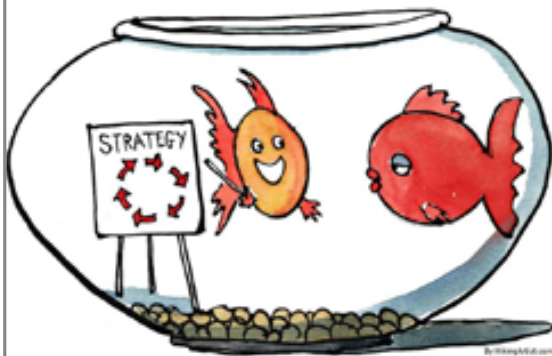
A plan that describes concretely how an organization will manage its communication process

Addresses both the organization's benefit and its stakeholders

Closely aligned with the organization's overall strategy and objectives

Product or document but also a process

Should NOT be a static document…

# RATIONALE FOR A COMMUNICATIONS STRATEGY

Strategic communication can be very broad – where will you focus your energy, resources, etc. ? What will bring  maximum impact for e.g.:

- Internal vs external focus
- Collect vs connect focus

Identify the key communication needs within the organisation and provide a plan for addressing these = stronger organisation

# DO I REALLY NEED ONE?

Not if it will become a document sitting on a shelf!

Process is what is important

Assess needs, engage people, obtain funds

Alternative:
- Needs assessment and consultations
- "Just Do It": integrate in work plan, project or program



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#AfricaSGCIforRnD        #SGCIworkshop

# CONTENTS OF A COMMUNICATION STRATEGY

Strategic objectives

Activities or initiatives associated with each objective

Resources required- responsible person (s); budget etc

Implementation plan

M&E plan

# COMMUNICATION STRATEGY PROCESS - STAGES

1. Align communication goals with organisational goals

2. Assessment of communication activities, capacities, knowledge flow and assets

3. Analysis of what exists, needs, gaps, etc.

4. Consultation with staff/partners

5. Drafting of strategy document and action/implementation plan (activities, tools, processes, deliverables, timeline, resources, responsibilities)

6. Validation with stakeholders

# GROUP EXERCISE- DEVELOPING IMPLEMENTATION PLANS FOR STRATEGIC COMMUNICATION

In groups representing each country

Develop your communication objectives, assess the specific activities required to achieve, capacities, communication flow and assets

Analyze what exists, needs, gaps, etc.

Draft an action/implementation plan to achieve your communication objectives (activities, tools, processes, deliverables, timescale, resources, responsibilities)

# EXAMPLES OF ENGAGEMENT WITH PRIVATE SECTOR



**OIST** OKINAWA INSTITUTE OF SCIENCE AND TECHNOLOGY GRADUATE UNIVERSITY

Shintake's Sea Horse Project aims to harness power from ocean currents, a source of renewable energy - 300 full-size propellers, expected to continually generate one gigawatt. Not only will this energy be clean, but it will also reduce Japan's reliance on foreign sources, which supply 80% of the nation's energy demands.

**PATH** A catalyst for global health

Power in her hands: the story of Sayana Press

**READ OUR SPECIAL FEATURE »**

Sayana Press DMPA-SC) is a new, lower-dose, easy-to-use injectable contraceptive that is administered every three months under the skin rather than into the muscle. Sayana® Press, the subcutaneous DMPA product available to Family Planning 2020 (FP2020) countries, is manufactured by Pfizer Inc.

Since 2014, PATH has coordinated pilot introductions of Sayana Press in Burkina Faso, Niger, Senegal, and Uganda, working closely with ministries of health and local partners. By early 2016, all four countries were moving to include the product in their national family planning programs

**ILRI** International Livestock Research Institute

**INDEX BASED LIVESTOCK TAKAFUL (IBLT)** *PICTORIAL MANUAL*

Overall objective?
Use research to help livestock keeping communities adapt to environmental risks and change

How?
Develop research-based innovations
Index-based livestock insurance
Targeted livestock keepers in drought-prone areas

# EXAMPLES OF ORGANIZATIONS STRATEGIC OBJECTIVES & COMMUNICATION OBJECTIVES

| Organization | strategic objective | Communications objective |
|---|---|---|
| ILRI (livestock) | Use research to help livestock communities adapt to environmental risks and change | To facilitate dissemination and uptake or research product |
| Ministry of Health, National TB Program (Health) | Sustain the gains made over the past decade, in the context of a newly devolved health system | Exponentially increase visibility of TB messages to raise awareness and debunk myths and misconceptions regarding TB, MDR-TB and XDR-TB. |
| ICRAF (Agroforestry) | Accelerate impact of agro-forestry and increase awareness and investment through an innovative programme of research and development | To contribute to the widespread uptake of ICRAF's research outputs in upscaling and outscaling agroforestry |

# STRATEGIC PLANS & COMMUNICATION STRATEGY

| Commissions/Agencies | National Strategic Plans | Communications Strategy |
|---|---|---|
| DRST (Botswana) | | |
| FONRID (Burkina Faso) | | |
| PASRES (Cote D'Ivoire) | | |
| MoST (Ethiopia) | | |
| MESTI (Ghana) | | |
| NACOSTI/NRF/KENIA (Kenya) | | |
| NCST (Malawi) | | |
| FNI (Mozambique) | | |
| NCRST (Namibia) | | |
| NCST (Rwanda) | | |
| MESRI (Senegal) | | |
| COSTECH (Tanzania) | | |
| UNCST (Uganda) | | |
| NSTC (Zambia) | | |
| RCZ (Zimbabwe) | | |
| EASTECO | | |

**Science Granting Councils Initiative Sub-Sahara Africa**

| | 3 Communication activities (Outputs-Products & Channels) | Key moments/timelines | 2-3 Key messages | Person Responsible | 2018 (Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec) | Expected outcome/What does success look like |
|---|---|---|---|---|---|---|
| **Strategic Objective 1** | | | | | | |
| Communication Objective | | | | | | |
| Primary target audience | | | | | | |
| Specific goal for reaching these audiences | | | | | | |
| | | | | | | |
| **Strategic Objective 2** | | | | | | |
| Communication Objective | | | | | | |
| Primary target audience | | | | | | |
| Specific goal for reaching these audiences | | | | | | |
| | | | | | | |
| **Strategic Objective 3** | | | | | | |
| Communication Objective | | | | | | |
| Primary target audience | | | | | | |
| Specific goal for reaching these audiences | | | | | | |

# Session Four: Evaluating to Learn

**Session overview:** This session covers units four and five and focuses on the importance of establishing learning loops and the need to evaluate your communication interventions for adjustments as required. Depending on the mood of the participants and their energy levels, it might be necessary to introduce an energizer at the beginning of this session. We suggest that this energizer is be led by a participant. The session is estimated to take two hours.

**Purpose:** Participants are introduced to the different tools and approaches they can use to monitor and track their reach; and how to evaluate the effectiveness of their approaches

**Objectives and outcomes:** By the end of this session;
- Participants will be equipped to identify appropriate tools for their use for continuous harvesting of feedback from stakeholders

**Methodology**
At this point, the participants might be experiencing fatigue from the intensive group and individual exercises. For this reason, we recommend that this session is delivered mainly through interactive lecture, plenary discussion and brainstorming.

**Materials**
Projector and PowerPoint slides

**Session duration: Two hours**

# UNIT 4: Tracking strategic communication activities and embedding learning in the overall institutional focus



TRACKING STRATEGIC COMMUNICATION ACTIVITIES
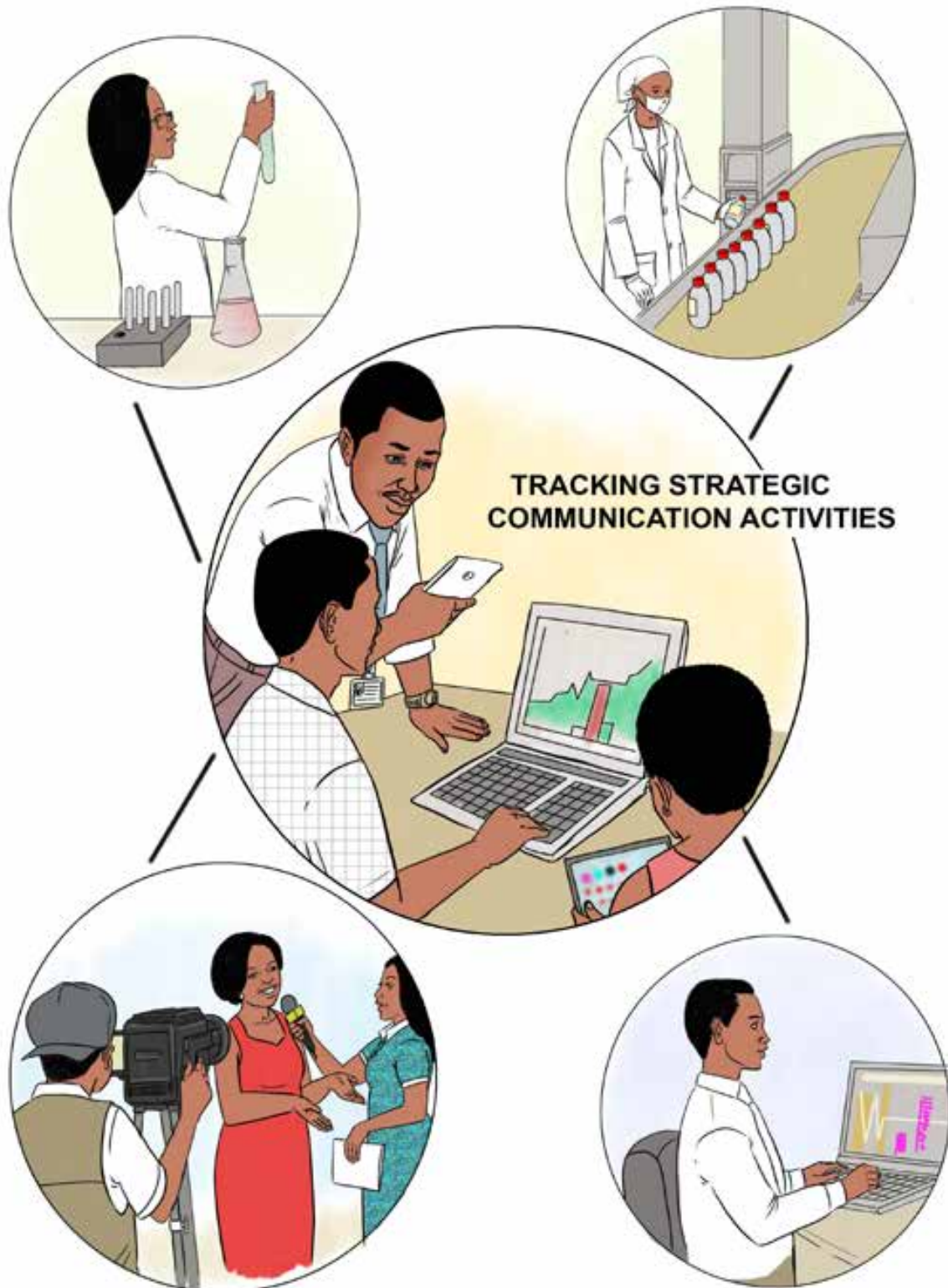
By now, the participants understand why it is critical to engage and communicate with the private sector and they have produced an implementation plan to guide them through this process. Is that enough? What next? This unit elucidates why monitoring and evaluation to learn from your communication strategy is critical.

## Step 1: Interactive lecture

Using PowerPoint slides the facilitator engages the participants in an interactive lecture to highlight why feedback loops should be developed and why it is critical to identify ways of measuring and monitoring communication interventions. Emphasis is also made on why it is necessary to have clear communication objectives, for any intervention or approach that is pursued.

Engage the participants in a question and answer (Q & A) session that seeks to draw out their experience in monitoring and evaluation. Emphasize why learning is an integral component of this process, to ensure that adjustments are made where necessary

Keeping in mind that most of the participants already manage projects at different scales, the objective is to emphasize that strategic communication does not end with the production of strategy documents and plans. Highlight that successful communications are a two-way street and periodic evaluations are necessary.

# Power point slides for unit 4

## WHY TRACK YOUR ACTIVITIES?



You need to manage the communication process/system

You need to identify what is working, what needs to change and what is changing in your area of operation

You cannot manage what you can't measure ➔ document outputs; milestones, goals, and track them

## HOW CAN YOU DO THIS?

### MAKE YOUR COMMUNICATIONS A TWO-WAY STREET



People like having conversations, but hate being "talked at." In order to be really effective with your communications, you need to view the process as a conversation, not a lecture.

Thus, one of the key strategies for your communications efforts should be to make people feel like part of your team. Talk to them as peers. Ask them for their suggestions. Keep them constantly in the loop. Make them feel like you're all one big team working towards a common vision (you are, aren't you?!)

## ESTABLISH A FEEDBACK LOOP



Have the right monitoring tools in place; capture response from the media and audience; learn for the future

Use different insights to create a feedback loop - your narrative, your communications plan, etc. need to be part of the product development

You should listen after you speak

## TAKE TIME TO LEARN FROM THE PROCESS

**Learning** is a developmental process that integrates thinking and doing. It provides a link between the past and the future, requiring us to look for meaning in our actions and giving purpose to our thoughts.

Source: Bruce Britton (2005)

# UNIT 5: Harvesting and capturing feedback
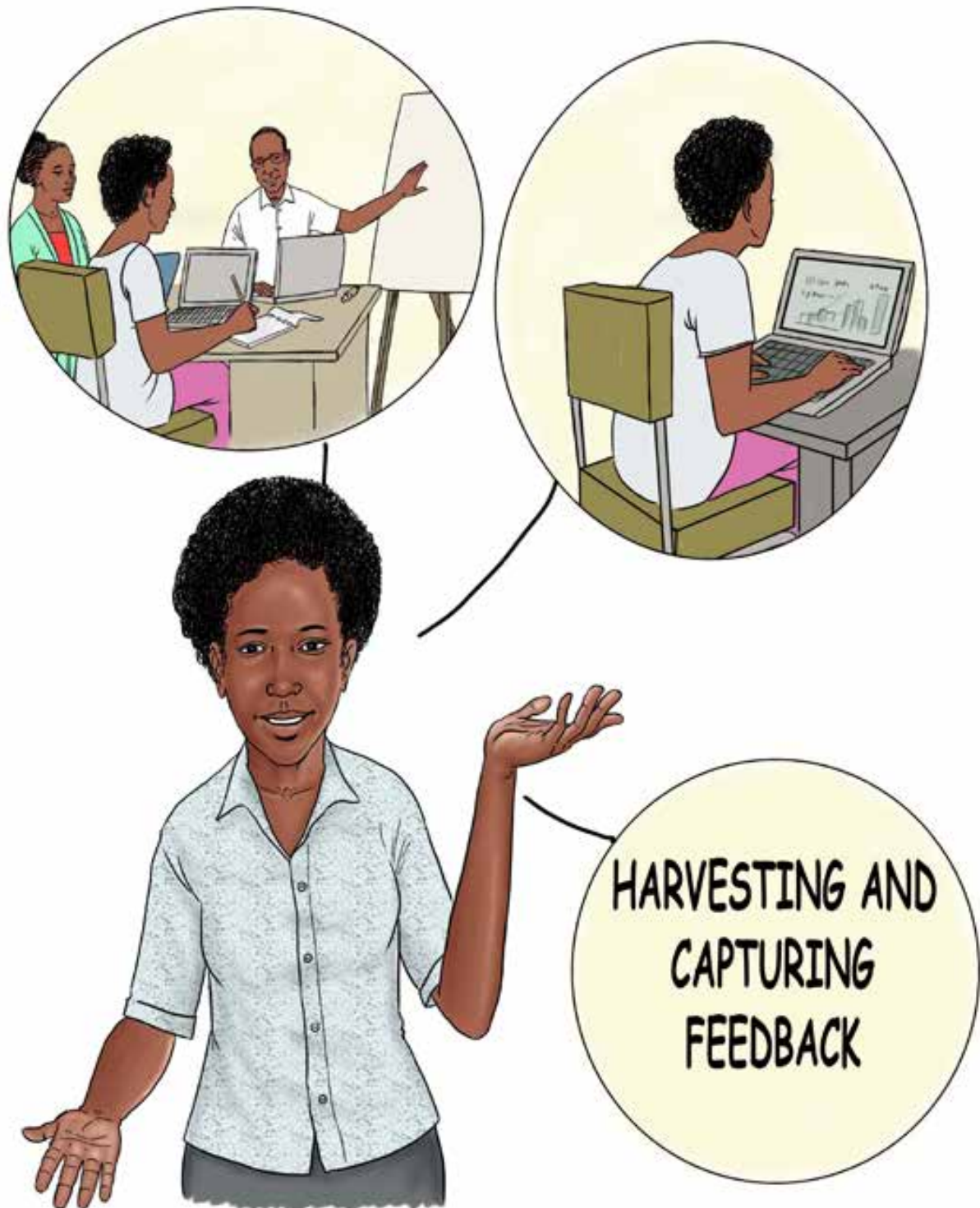
Having designed your communications and engagement as a two-way street, it is not only critical to share information as and when intended; it is also imperative to harvest and capture the feedback coming from the opposite street.

## Step 2: Interactive lecture

Using PowerPoint slides, the facilitator delivers an interactive lecture that shares examples of the different tools and platforms that can be used, the advantages and disadvantages of each and how to identify what can work well for your organization.

Delivery of this also relies heavily on examples of successful case studies. (see the references in the annexes) and participants experiences shared in plenary in component 2 of unit 3 (see step 5).

## Step 3: Wrap up and summary

After an intensive exercise-filled day, participants are likely to be very exhausted. We recommend a light exercise to wrap up the day

Request the participants to step away from their tables and sit in a semi-circular shape at an appropriate area of the room. Request them to pair up and in ten minutes share on what they enjoyed most and why?

After ten minutes, invite voluntary plenary sharing on what they discussed. Record any notable points you hear.

Conclude with an announcement on the starting time for day three and expected overall agenda.

# Power point slides for unit 5

## KNOWLEDGE HARVESTING-CAPTURING & CREATION

**Harvesting** knowledge is a rigorous, results-driven process for capturing and transferring vital information, insights and processes.

*Knowledge creation* is defined as the act of making knowledge created by individuals available, amplifying it in social contexts, and selectively connecting it to the existing knowledge in the organization (Nonaka & von Krogh, 2009).
*Key words to remember **Knowledge creation | Knowledge sharing | knowledge transfer**

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## WHY IS IT IMPORTANT TO HARVEST & CAPTURE KNOWLEDGE



If 80% of knowledge is unwritten and largely unspoken, we first need to elicit that before we can articulate, share, and make wider use of it.

**Knowledge harvesting** is one way to draw out and package knowledge to help others adapt, personalize, and apply it; build organizational capacity; and preserve institutional memory

## REASONS WE DO NOT HARVEST OR CAPTURE KNOWLEDGE

Lack of time

Lack of management support

Lack of resources

Lack of clear guidelines around collecting the information

Lack of processes to capture information

Lack of knowledge base to store and search information captured
**for future us**

## HOW TO HARVEST & CAPTURE KNOWLEDGE

**Focus/identify** helps you identify the critical knowledge that is most urgent and important to capture

**Find** provides guidance on locating experts and existing, useful documents and information

**Elicit** shows you how to conduct effective inquiries

**Organize** instructs you on how to make sense of the information collected i.e. identify patterns and organize the feedback into logical groups of support information and guidance

During **Packaging & Dissemination,** you determine the best vehicle for packaging the knowledge so that it can be transferred to others. You determine how best to apply the know-how and then share

## HOW TO HARVEST & CAPTURE KNOWLEDGE I.E. LESSONS LEARNT

What are lessons learned and best practices

Why is it important for them to be captured

How do we capture lessons learned and best practices

Dissemination our lessons and best practices

# KNOWLEDGE CREATION

**Examples of blogging and web content creation** in the development context

#AfricaSGCIforRnD          #SGCIworkshop
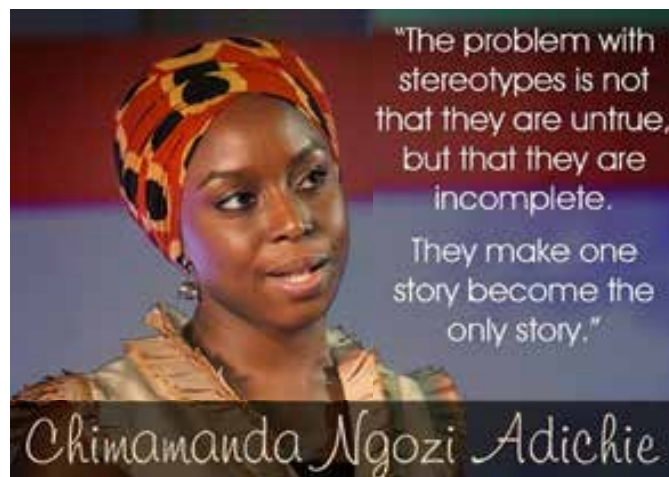
# DAY THREE.

# Session Five: Learning From Peers

**Session Overview:** This session focuses on enabling the participants to break down and internalize their proposed communication implementation plan. It is meant to allow the participants to finalize their implementation plans, incorporating feedback from the facilitators and from fellow participants. It is estimated to take two and a half hours.

**Purpose:** Emphasize the objective of the training workshop, which is to enable participants to begin implementing strategic communication for their organizations or in their projects. This session will articulate why and how a well-developed and outlined plan is an excellent milestone towards structured communications, and this vital document is likely to be a huge motivator for the trainees to implement lessons from the workshop.

**Objectives and outcomes:** By the end of this session;
- Implementation plans will have been reviewed to ensure the proposed approaches are practical and are well articulated.
- Participants will have received constructive feedback to enable them to finalize their implementation plans

**Methodology**
Plenary presentations and discussions

**Materials**
Projector and PowerPoint slides; flip charts, marker pens

## Step 1: Recap

Day three begins with a recap of day two and a quick overview of the day's agenda.

In 15 minutes request a participant (who should have volunteered the previous evening) to share a summary of what was covered in day two.
Allow the rest of the participants to contribute any points they feel need to be highlighted

## Step 2: Plenary presentations and discussions

Request the different groups to present the implementation plans previously developed. (See step no. 8 of unit 3) One and a half hours is allocated for plenary presentation of the implementation plans.

The facilitators should ensure that the objectives are SMART. Provide feedback where necessary and engage the participants in discussions in understanding their choice of interventions.

Encourage participants to study the plans and ask questions or provide suggestions for improvement. This is an invaluable session that offers a platform for peer learning. Its objective is to ensure that participants understand the need for a sound implementation plan that is clear in its intentions.

After the intensive plenary presentations, request participants to go back to the groups and finalize the plans based on feedback from facilitators and fellow participants.

Once finalized, the facilitator should collect all plans for formatting and printing in 'poster formats' for participants to take back to their organizations.

**NRF** NATIONAL RESEARCH FUND   *Funding Excellence and Research and Innovation for National Development.*

# COMMUNICATION IMPLEMENTATION PLAN 2018

| Strategic Objective | To Enhance customer satisfaction and mobilize reseaerch funds | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Communication Objective** | To facilitate clear understanding of NRF mandate and manage external and internal NRF customers and increase reseaerch fund | | | | | | | | | | | | | |
| **Primary target audience** | Private Sector players, R&D institutions, Researchers and Staff; National treasury | | | | | | | | | | | | | |

| Specific goal for reaching these audiences | Communication activities (Outputs-Products & Channels) | Key moments | Key messages | Person Responsible | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Expected outcome/What does success look like |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| To increase research funds for Research and Development activities | Organize series of round table meetings to share resource mobilization strategy | National Science week, May, 2018 | NRF is expected to at least 2% of the GDP for R&D. Presently only about 0.5%, this provide a good partnership opportunities to raise funds to promote research and Innovations | CEO | | | ▓ | | | | | | | | More private sector players agreeing to contribute research funds to NRF Kitty |
| | Breakfast meetings with targeted key plays | Nairobi Innovation Week, March, 2018 | | | ▓ | | | | | | | | | | |
| | Pitching sessions to private sector players | October, 2018 | | | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | | | |

**Le Programme d'Appui Stratégique à la Recherche Scientifique (PASRES)**

## Cote D'Ivoire PLAN DE MISE EN ŒUVRE DES COMMUNICATIONS 2018

| Objectif stratégique 1: | Contribuer à la formation des chercheurs en Côte d'Ivoire | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Objectif communication | Sensibiliser les institutions de recherche sur la nécessité d'avoir des chercheurs performants susceptibles d'assurer la relève scientifique | | | | | | | | | | | | | | | |
| Public cible principal | Université public | | | | | | | | | | | | | | | |
| Objectif spécifique pour atteindre ces publics | 3 Activités de communication (sorties-produits et canaux) | Moments clés / délais | 2-3 messages clés | Personne responsable | Mar | Avr | Mai | Juin | Juil | Aout | Sep | Oct | Nov | Dec | Résultat attendu / À quoi ressemble le succès? |
| Sensibilise les chercheurs sur la nécessité du renforcement des capacités, Motiver les responsables d'institution à faire des demandes à l'attention des chercheurs et enseignants chercheurs de leur institution | 1. Transmission de plaquette de formation, 2. Organisation de séance de travail avec les différentes institutions, mettre des affiches dans les universités et centres de recherche, communication sur les | Activités nationales de promotion de la recherche scientifique et de l'innovation technologique (à confirmer) | 1. En plus du financement de la recherche, le PASRES offre des formations gratuites aux enseignants, enseignants-chercheurs et doctorants sur la rédaction de projets scientifiques, la rédaction d'article scienfique, l'entreprenarial 2- Les participations féminines sont vivement encouragées et souhaitées. | Dr OUATTARA Annette Responsable du renforcement des capacités PASRES | | | | | | | | | | | Plus de demande de formation, plus de femme inscrite sur la liste des participants à la formation, |

| Objectif stratégique 2: | Contribuer à un meilleur fonctionnement des laboratoires et stations de recherche en leur apportant des appuis multiformes | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Objectif communication | Fournir un cadre de travail adéquat aux chercheurs afin d'obtenir des resulta | | | | | | | | | | | | | | | |
| Public cible principal | Responsable de laboratoire et institution de recherche | | | | | | | | | | | | | | | |
| Objectif spécifique pour atteindre ces publics | Activités de communication (sorties-produits et canaux) | Moments clés / délais | 2-3 messages clés | Personne responsable | Mar | Avr | Mai | Juin | Juil | Aout | Sep | Oct | Nov | Dec | Résultat attendu / À quoi ressemble le succès? |
| Encourager les responsables à exprimer leurs besoins en matière de ressources matérielles et humaines | Informer via les dépliants du PASRES et les réseaux sociaux des activités du PASRES | Lors des visites du PASRES dans les institutions de recherches ou de la visite d'un responsable d'institution au Secrétariat Exécutif du PASRES, pendant les séances d'évaluation des proejts de recherche financés (période à déterminer) | Le PASRES apporte des appuis aux structures de recherche en matière de réhabilitation des stations et laboratoires, de renforcement des capacités (équipements et connectivités) et d'accès à l'information scientifique. | Dr TRA BI TRA Eric | | | | | | | | | | | Laboratoire et station de recherche équipée, resultats de recherche fiable |

**RWANDA National Commission for Science and Technology (NCST)**

## COMMUNICATION IMPLEMENTATION PLAN 2018

| Strategic Objective 1: | To facilitate dissemination of research and innovation outputs |
|---|---|
| **Communication Objective:** | Support research institutions to share research findings with the private sector and community |
| **Primary target audience:** | Researchers |

| Specific goal for reaching these audiences | 3 Communication activities (Outputs-Products & Channels) | 2-3 Key messages | Person Responsible | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Expected outcome/What does success look like |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| To develop simple materials from research findings that can be shared and adopted by the private sector | 1. Develop templates and toolkits on synthesising research papers into brief articles for non-technical audiences 2. Organize researchers - private sector symposia 3. Develop online collaboration tools (Internet) | 1. Research uptake by the private sector is still low. There is a need for the private sector to adopt research outputs to increase productivity 2. Research conducted is still largely unused. We need researchers to disseminate their findings and demonstrate their potential to solve existing problems. | NCST's Community Outreach Office | | | ▣ | | | | ▣ | | | ▣ | 1. Research findings are easily communicated using templates and toolkits 2. Strenghtned linkages between researchers and private sector and increased adoption of research findings 3. Research information is easily accessible online. |

| Strategic Objective 2: | To Ensure STRI Planning is linked to National Socio - Economic Development |
|---|---|
| **Communication Objective:** | Increase awareness on the need to link STRI planning to national socio-economic development |
| **Primary target audience:** | STRI - Linked institutions |

| | Develop working relationships to facilitate harmonisation of goals and identify areas of synergy between STRIs and other national institutes | 1. Organise joint planning meetings with various relevant national institutions: Develop key messages to highlight benefits of linking NCST's objectives to the country's socio-economic development - could be through short video clips and TV interviews | | | | | | | | | | | | |

| Strategic Objective 3: | To raise public awareness on NCST mandates and achievements |
|---|---|
| **Communication Objective:** | To increase awareness of NCST responsibilities and achievements |
| **Primary target audience:** | Key stakeholders & Public |

| Awareness of NCST mandates and achievements | 1. Produce video documentaries; 2. Establish socail media presence and engagement of various stakeholders; 3. Produce promotional items containing varied brief messages | | Communications Specialist/ brand coordinator | | | | | | | | | | | |

# Zambia: COMMUNICATION IMPLEMENTATION PLAN 2018

| Strategic Objective | To mobilize and provide resources in order to support science, technology and innovation in the country | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Communication Objective** | To facilitate documentation of the Councils achievement in supporting STI | | | | | | | | | | | | | | |
| **Primary target audience** | Private sector (Mobile network providers, Mines), NGOs, international donors | | | | | | | | | | | | | | |
| **Specific goal for reaching these audiences** | to support the Councils initiatives in supporting STI | | | | | | | | | | | | | | |

| Communication activities | Key moments | Key messages | Person Responsible | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Expected outcome/What does success look like |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Outputs-Products:** documentaries of supported STI activities, Reports/flyers/brochures, prototypes. **Channels:** Radio program, TV interviews, round table meetings, institutional website, social media platforms, | Documentaries/flyers/brochures/posters produced quarterly Reports produced annually | Number of research projects funded Type of research projects funded (basic or applied); Areas of research funded Actual outputs of research projects supported (prototypes, Publications) Number of postgraduate students supported; Geographical spread of the support | Promotions unit, Grants unit, Management, project leaders | ▓ | ▓ | ▓ | ▓ | | | | | | | Co-funding of research projects with private sector Donor funding for S&T activities More postgraduate students supported More parts of the country receiving |

> " 
> **This session is delivered through interactive lectures, group brainstorming, and plenary discussions** "

# Session Six: Webbing It!

**Session overview:** Session six introduces how online platforms can facilitate effective and efficient communication and engagement with stakeholders. Focus is also placed on privacy and copyright issues in online publishing and communication. It is estimated to take two hours.

**Purpose:** This session is critical to enable participants understand the available options towards maximizing their use of online platforms and how to ensure they operate within the legal provisions.

**Objectives and outcomes:** By the end of this session, participants will:
- Understand how online platforms can enhance strategic communications
- Introduce different tools and platforms that can be used for digital publishing
- Articulate how social media can be used to enhance stakeholder engagement

## Methodology
This session is delivered through interactive lectures, group brainstorming, and plenary discussions

## Materials
Flip charts, index cards, marker pens

# UNIT 6:Understanding digital publishing and social media

## Step 1: Interactive lecture

Using a Powerpoint presentation, engage the participants in a one-hour interactive lecture that introduces digital publishing.

The lecture will also introduce social media and other online platforms and tools that facilitate online engagement.

Use of case studies and examples is critical for delivery of this unit. Provide examples that the participants can study and relate to.

## Step 2: Guided group brainstorming

In random groups voluntarily formed, request the participants to analyze the examples provided and discuss how social media can work in their context and the necessary steps they can take towards building an online presence. This exercise is designed to enable the participants to identify any enablers in their institutions, networks and the resources available to promote online engagements.

# Powerpoint slides for unit 6

## WHAT IS DIGITAL MEDIA?

websites and applications that enable users to create and share content or to participate in social networking.

JAN 2017

### DIGITAL MEDIA IN AFRICA
KEY STATISTICAL INDICATORS FOR THE REGION'S INTERNET, MOBILE, AND SOCIAL MEDIA USERS

| TOTAL POPULATION | INTERNET USERS | ACTIVE SOCIAL MEDIA USERS | MOBILE SUBSCRIPTIONS | ACTIVE MOBILE SOCIAL USERS |
|---|---|---|---|---|
| 1,231 MILLION | 362 MILLION | 170 MILLION | 995 MILLION | 150 MILLION |
| URBANISATION: 41% | PENETRATION: 29% | PENETRATION: 14% | vs. POPULATION: 81% | PENETRATION: 12% |
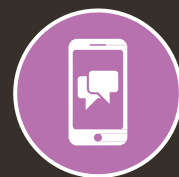
SOURCES:  POPULATION: UNITED NATIONS; U.S. CENSUS BUREAU;  INTERNET: INTERNETWORLDSTATSITU, INTERNETLIVESTATCIA WORLD  FACTBOOK ; FACEBOOK; NATIONAL REGULATORY AUTHORITIES; SOCIAL MEDIA  AND MOBILE SOCIAL MEDIA: FACEBOOK;   TENCENT; VKONTAKTE LIVE INTERNET, KAKAO; NAVER NIKI AGHAEI; CAFEBAZAAR.IR, SIMILARWEB DING; EXTRAPOLATION OF  TNS DATA; MOBILE: GSMA  INTELLIGENCE; EXTRAPOLATION OF MARKETER AND ERICSSON DATA.

11

Hootsuite™     we are social

# YOU DON'T HAVE TO GO IT ALONE



A conversation with a like-minded colleague might lead to a partnership where you share the burden of learning

and **APPLYING** a new skill

# DEFINE & KNOW YOUR AUDIENCE

There is no 'General Audience'

# KNOW WHAT'S GOING ON AND PLAN

So find out who's blogging and writing in your space already; follow them on Twitter and add them to your RSS feed reader.

# SHARE THE MANY DIFFERENT "VOICES" OF YOUR RESEARCH

Who or what are the protagonists of your research and how can you portray these voices

## EYE-CATCHING & CLEAR DATA VISUALISATIONS & INFOGRAPHICS

Think about what data you have access to, what story you want to tell, what you want to achieve, and who your target audience might be

## EXTEND THE LIFE OF YOUR EVENTS
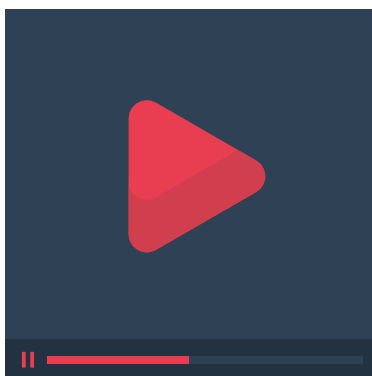


SUBSCRIBE >

Use photos and videos on social media to record the lecture

## PROVIDE A LINK TO AN OPEN-ACCESS VERSION

# of the primary research

Share your data if you can!

---

## ABOVE ALL

### Learn, Adapt & Change

Improving communications doesn't necessarily solve problems. It does, however, make it possible to solve them

# SOCIAL MEDIA PLATFORMS
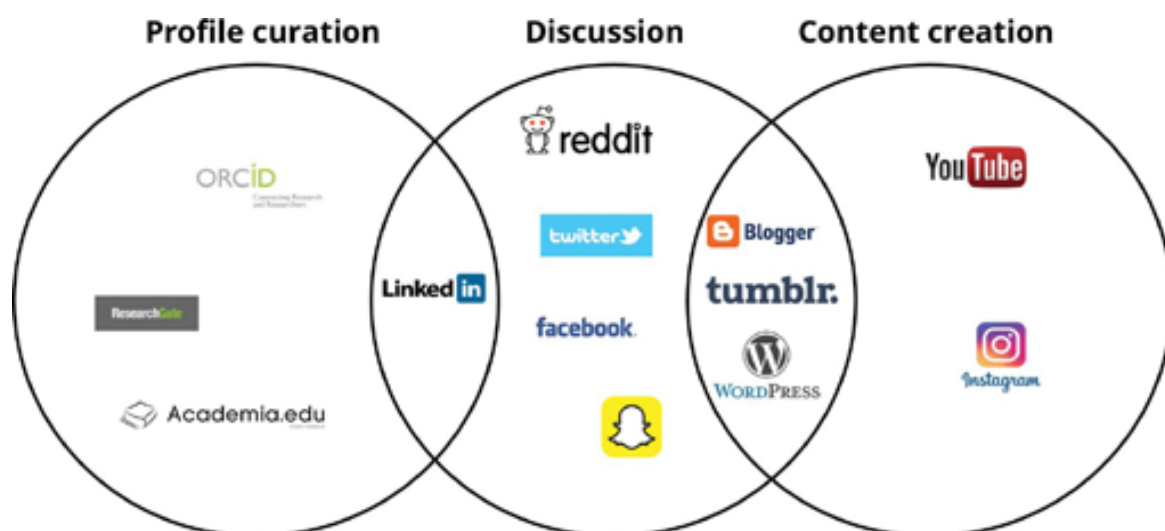
# PROFILE
# CURATION

This is about you
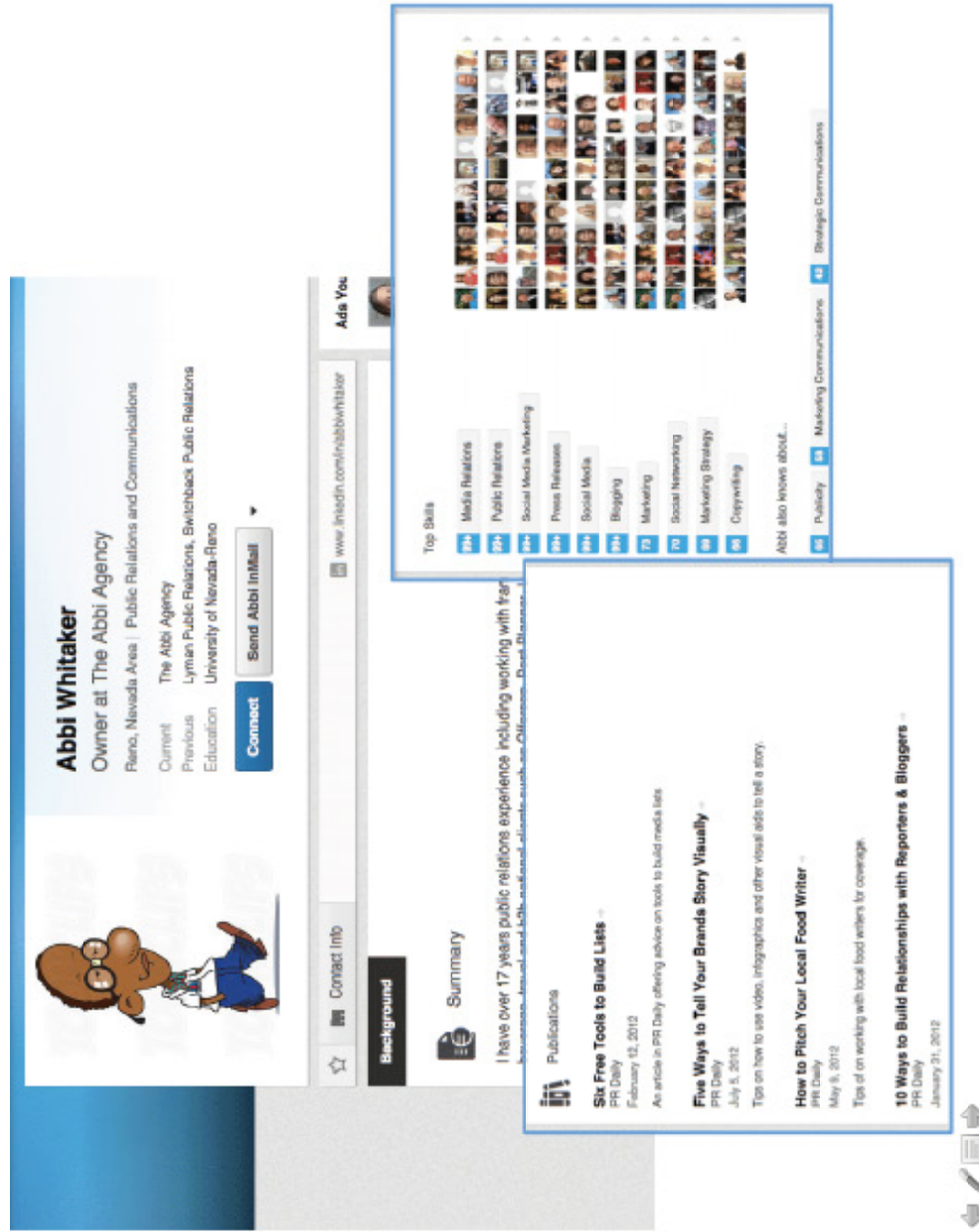
## DISCUSSION



Knowledge exchange is vital to communications and Research

## CONTENT CREATION

Utilizing the process and outcomes or research to fuel and support the narrative you want

Networking Through Social Media

This is about you

---



# Twitter

**No of users**
*6.8 Million (Africa)*

**Best for**
*Real time content & interaction*
**Audience type**
*Varying*

**BEST PRACTICE**

▌ *Choose a short user name!*

▌ *Look for hashtags used in your field*

▌ *Use URL shorteners like bit.ly to help save space when you are sending links.*

## Tagging
*Tagging allows users to increase their reach without having to include the names on the tweet*

#AfricaSGCIforRnD     #SGCIworkshop

## # Hashtags

*Twitter users put hashtags in their tweets to categorize them in a way that makes it easy for other users to find and follow tweets about a specific topic or theme*

# Twitter

## Threads

*Threads have become popular because they allow for more space, which allows for more context and thought than even a 280-character tweet. In a world where nobody seems to believe anybody, a little extra space to explain can be invaluable.*



# R<sup>G</sup> Research Gate

**No of users**
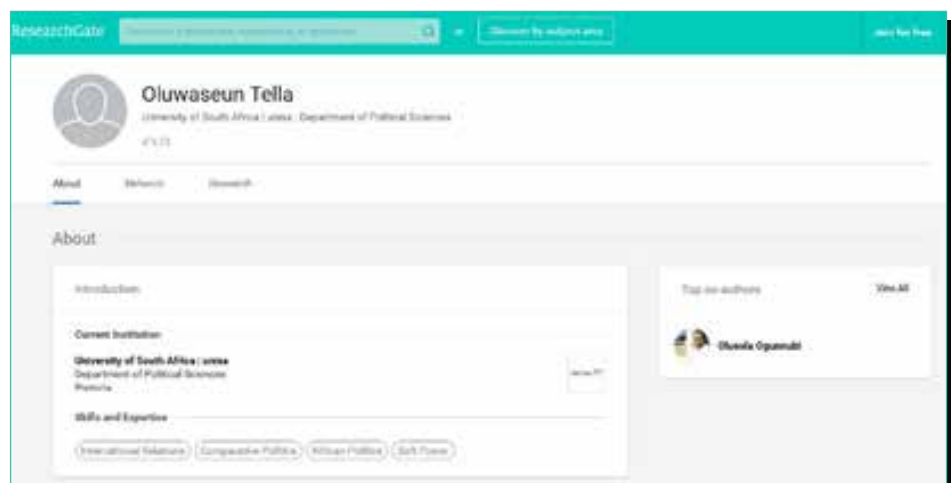*11 Million users*

**Best for**
*Networking site for scientists and researchers*

**Audience type**
*Researchers*

## BEST PRACTICE

▪ Share papers

▪ Ask & answer questions

▪ Find collaborators



**92**

## Research

Research Items (14)

Top co-authors

**South African Higher Education: The Paradox of Soft Power and Xenophobia**

Chapter    Jan 2018 · The Political Economy of Xenophobia in Africa

Olusola Ogunnubi

Oluwaseun Tella

There is a robust literature on xenophobia in South Africa. Furthermore, there has been recent, although still minimal academic interest in South Africa's soft power credentials. However, no attention has been paid to the actual or potential role of higher education in the projection of the country's soft power in the hearts and minds

View                                                                                                    4 Reads

**Boko Haram Terrorism and Counter-Terrorism: The Soft Power Context**

Article    Nov 2017 · Journal of Asian and African studies

Oluwaseun Tella

Given terrorists' use of violence in pursuit of their objectives and violent counter-terrorism measures, terrorism is not often associated with soft power. Nevertheless, terrorist organisations subscribe to ideologies that are appealing to certain individuals and/or segments within their immediate environment and beyond. Similarly,

View                                                                                                    36 Reads

---

About        Network        Research

| 14 | 1,679 | 35 |
|---|---|---|
| Research items | Reads | Citations |

## Network

| Co-authors | Followers | Following |
|---|---|---|
| Olusola Ogunnubi | Shola Omotola | Shola Omotola |
| | University of KwaZulu-Natal | Heike Tappe<br>University of KwaZulu-Natal |
| | Alexis Abodohoui<br>Laval University | Kealeboga Maphunye<br>University of South Africa |
| | Abbas Varij Kazemi<br>Institute For Social and Cultural Studies | Abbas Varij Kazemi<br>Institute For Social and Cultural Studies |
| | Atta Barkindo<br>SOAS, University of London | Christopher Isike<br>University of Zululand |

**Linked in**

**No of users**
*467 million users*

**Best for**
*Business & employment oriented social networking service*

**Audience type**
*Professional networking*

**Best posting times:**
*Mon - Fri, 7am - 8am and 5pm - 6pm*
*Tue between 10am - 11am*
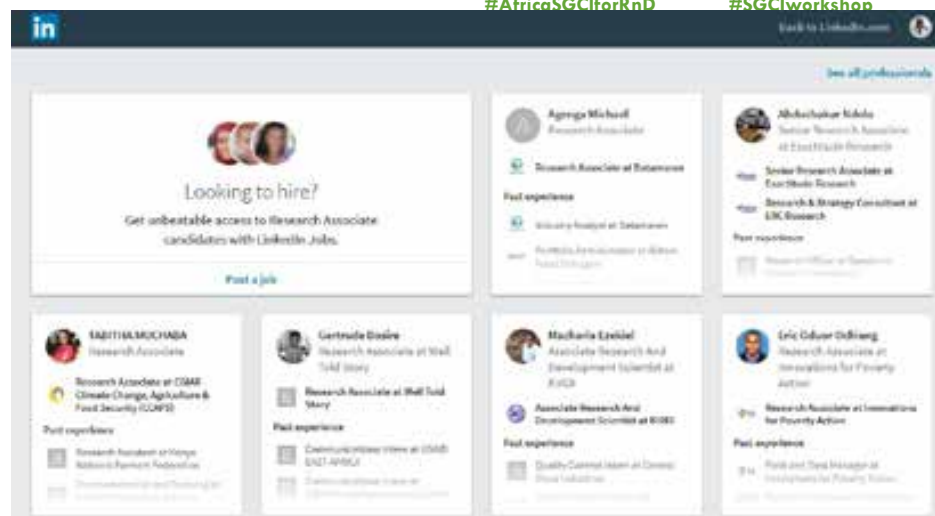
#AfricaSGCIforRnD        #SGCIworkshop

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#AfricaSGCIforRnD        #SGCIworkshop

# BEST PRACTICE: NETWORK



❚ Create a network of colleagues & professionals in your field from whom you can seek advice;

❚ Stay in touch with past and present colleagues;

❚ Discover connections when you're looking for a job;

❚ Recommend and endorse others;

❚ Receive recommendations from colleagues;

❚ List your skills and experience; and join groups and participate in discussions

## "

**Participants are engaged in a light exercise to collect feedback on their views of the training workshop, lessons learned, and next steps.**

"

# Session Seven: Winding Up

**Session overview:** After an intensive activity-filled three-day workshop, it is important to take some time to reflect on what has been covered and identify any lessons that can inform future workshops as you discuss next steps with the participants. This is the final session of the workshop that includes evaluation and closing. The session is estimated to take one and a half hours

**Purpose:** Participants are engaged in a light exercise to collect feedback on their views of the training workshop, lessons learned, and next steps. Participants also fill out an evaluation form which could be online or offline.

**Objectives and outcomes:** By the end of this session, participants will have;
- Filled the evaluation forms
- Shared on their next steps upon arriving at their work stations

**Methodology**
Delivery of this session is through a facilitator-guided online survey and an interactive discussion

**Materials**
Evaluation forms; flip charts, marker pens

# Post training evaluation

**Instructions:**

This session requires all participants to have and use a laptop. Internet connection is also required.

## Step 1: Online survey

Share a link to a previously developed online survey that contains questions that cover the following areas:

- The relevance of topics covered
- Time allocation for sessions
- Modes/methods of delivery
- Quality of facilitation
- Venue and logistics
- Suggested recommendations for future trainings

The survey should be designed to take no more than half an hour.

We recommend an online survey because it takes less time and analysis is easier and prompt.

## Step 2: Action steps/follow up

After the evaluation survey, engage the participants in drawing out their planned action following the workshop.

---

**WAY FORWARD**   |   #AfricaSGCIforRnD        #SGCIworkshop

### REFLECTION ON THE LEARNING PROCESS

**Individual 5 min**

**Guiding questions for the exercise:**
- What did you learn these two days?
- What new perspectives or ideas have changed your thinking and behavior on communication with the private sector?
- What exactly and how has it changed you?
- What are your next steps when you get home?

---

## Step 3: Posters and certificates

This is then followed by issuing of printed posters of the implementation plans and issuing of certificates (if any)

Wrap up the workshop by providing details of your availability for any post-workshop support, your contact details, and options for follow up on the execution of the communication implementation plans.

# RESOURCES
# AND TOOLS

## PART

# 3

You can use *Altitude* to agree on expectations and keep people focused at the right level to serve the goals of the meeting.

# Annexes
## Annex 1: Pre-training assessment
Below is sample questionnaire for the pre-training assessment that can be tailored as needed:

<div style="background-color:#6b1515; color:white; padding:8px;">
Enhancing communication and engagement of African science granting councils with the private sector: A pre-training assessment
</div>

Thank you for taking a few minutes to participate in this pre-training assessment. We would like to ensure that your participation in the upcoming training is maximized and that we deliver a useful, customized learning experience that will respond to your needs and experiences. Your input is significant and will help us structure and deliver the training. Results from this assessment will be presented at the training. Thank you for your participation.

---

**Respondent Information**

1. Age:
   - ☐ <35 years
   - ☐ 35-50 years
   - ☐ >50 years

2. Sex:
   - ☐ Male
   - ☐ Female

3. Country
   - ☐ Botswana
   - ☐ Burkina Faso
   - ☐ Ethiopia
   - ☐ Ghana
   - ☐ Ivory Coast
   - ☐ Kenya
   - ☐ Malawi
   - ☐ Mozambique
   - ☐ Namibia
   - ☐ Rwanda
   - ☐ Senegal
   - ☐ Tanzania
   - ☐ Uganda
   - ☐ Zambia
   - ☐ Zimbabwe

---

4.      Please indicate your job level
- ☐ Manager
- ☐ Director
- ☐ Chief Executive
- ☐ Other (please specify)

5.      Please indicate how long you have worked for your institution
- ☐ 1-5 years
- ☐ 6-10 Years
- ☐ 11-15 Years
- ☐ More than 15 years

6.      Have you ever received any training in communication?
- ☐ Yes
- ☐ No

7.      If yes, above, what kind of training?
- ☐ Formal academic training (leading to an academic certificate)
- ☐ Non-academic training
- ☐ On the job training (part of your job)

## Engagement with the private sector

8.      Do you have any engagements (in an official capacity) with the private sector?
- ☐ Yes
- ☐ No

9.      If yes above, please indicate the frequency of your engagement with the private sector
- ☐ At least Quarterly
- ☐ Biannually
- ☐ Annually

10.     What kinds of engagement do you have with the private sector?
- ☐ Agenda/priority setting
- ☐ Joint project planning
- ☐ Joint technical working groups
- ☐ Monitoring and Evaluation
- ☐ Other (please specify)

11.     Please indicate ways in which you engage with the private sector
☐     Conferences and workshops
☐     Roundtables and dialogues
☐     Face to face meetings

12.     Which channels do you use to communicate with the private sector?
☐     Phone calls
☐     Newsletters
☐     Email
☐     Website
☐     Skype
☐     Videoconferencing
☐     Publications (reports, briefs, flyers, etc.)
☐     Social media (Twitter, Facebook, LinkedIn, YouTube, Slide share,
☐     Instagram, etc.)
☐     Mainstream media (television, newspapers)
☐     Vernacular FM stations

13.     What internal barriers, if any, do you face in your efforts to communicate and engage with the private sector?
☐     Organizational policy and mandate
☐     Organizational culture
☐     Methodologies and approaches
☐     Skills and capacities
☐     Technology and infrastructure
☐     Lack of resources (funding/staff/time)
☐     Lack of interest

14.     On a scale of 1-3 (where 1 is least important, and 3 is most important), please rate the importance of communication and engagement of private sector for your institution:

| **Training topics** | | | |
|---|---|---|---|

15. How important are the following training topics for you?

|  | ☐ Very Important | ☐ Somewhat Important | ☐ Not Sure | ☐ Not Important |
|---|---|---|---|---|
| How to identify and characterize your audiences | | | | |
| Different tools and approaches to use | | | | |
| How to work collaboratively online | | | | |
| Know different communication channels and how to use them | | | | |
| How to implement a two-way communication process | | | | |
| How to structure and package your message | | | | |
| How to monitor and evaluate your communication interventions | | | | |
| How to initiate and maintain good working relations with the private sector | | | | |
| How to use social media to enhance your corporate communications | | | | |

16. What other topics would you like the training to cover?

┌─────────────────────────────────────────────────────┐
│                                                     │
│                                                     │
│                                                     │
└─────────────────────────────────────────────────────┘

17. Does your institution have a communication strategy?

☐ Yes

☐ No

☐ I don't know

18. If yes in 17 above, does it have a provision for engagement with the private sector?

☐ Yes

☐ No

☐ I don't know

19. If yes in 18 above, in your opinion, do those provisions support your engagement with the private sector?

☐ Yes

☐ No

☐ I am not sure

20.        Do you have a dedicated office/officer for communication in your institution?

☐   Yes

☐   No

## Social media use

21.        Do you use social networking sites?

☐  Yes

☐  No

22.        Which of the following social networking sites do you use?

(Tick all that apply)

☐        Facebook

☐        LinkedIn

☐        Twitter

☐        Instagram

☐  Other, please specify:

| |
|---|

23.        Roughly how long have you been using social networking sites?

☐        Less a year

☐        1-3 years

☐        3-5 years

☐        More than 5 years

24.        Please indicate how often you interact with these categories of people using social networking sites.

| | Daily | Weekly | Monthly | Never |
|---|---|---|---|---|
| Close friends and family | ☐ | ☐ | ☐ | ☐ |
| Co-workers | ☐ | ☐ | ☐ | ☐ |
| Researchers | ☐ | ☐ | ☐ | ☐ |
| Private sector | ☐ | ☐ | ☐ | ☐ |
| Donors and funding agencies | ☐ | ☐ | ☐ | ☐ |
| Other science granting councils | ☐ | ☐ | ☐ | ☐ |
| The general public | ☐ | ☐ | ☐ | ☐ |

25.      Do you engage your institution on social media?

☐               Yes
☐               No

26.      If yes, above, how often do you engage your organization on social media?
☐ Daily
☐ A few times a week
☐ Occasionally
☐ Rarely
☐ Never

27.      Does your institution have an official social media account(s)?
☐ Yes
☐ No

28      Does your organization have a dedicated person for social media management?
☐               Yes
☐               No

Thank you for participating in this pre-training assessment

# Annex 2: Training Program

**Day One**

| | | |
|---|---|---|
| | 0830-0900 | Welcome and introductions |
| **Session One** | 0900-0915 | Expectations and Fears |
| | 0915-0945 | Overview of training program and approach |
| | 0945-1000 | Ground rules |
| | 1000-1030 | Pre-training assessment results |
| **Coffee Break** | 1030-1100 | |
| **Session Two** | 1100-1300 | Unit 1: Introduction to Strategic communication |
| 1300-1400 | Lunch Break | |
| **Session Two** | 1400-1500 | Energizer |

**Unit 1 continued- Audience mapping**

| | | |
|---|---|---|
| | 1500-1630 | Unit 2: Developing a suitable environment for leading and facilitating strategic communication |
| | 1630-1700 | Day one evaluation and wrap up |
| 1700 | End of day one | |

**Day Two**

| | | |
|---|---|---|
| | 0830-0930 | Welcome and a recap of day one |
| | 0930-1100 | Unit 3: Designing appropriate strategic communication approaches |
| | 1100-1130 | Coffee break |
| | 1130-1330 | Unit 3 continued |
| | 1330-1430 | Lunch Break |
| | 1430-1530 | Unit 3 continued |

**Session Four**

| | | |
|---|---|---|
| | 1530-1630 | Unit 4: Tracking and embedding learning in your overall project/institutional focus |
| | 1630-1700 | Reflections, feedback, and wrap-up |
| | 1700 | End of Day Two |

**Day Three**

|  | 0830-0900 | Recap of day two |
|---|---|---|
| **Session Four** | 0900 – 1000 | Unit 5: Harvesting and capturing feedback |
|  | 1000-1030 | Coffee Break |
| **Session Five** | 1030 – 1130 | Communications strategy- Group work on the implementation plan |
|  | 1130-1300 | Presentation of draft communication implementation plans |
| 1300-1400 Lunch Break | | |
| **Session Six** | 1400-1500 | Unit 6: Collaboration: Understanding how communication can support a collaborative environment internally and externally |
|  | 1500-1600 | Unit 7: Emerging issues on a changing communication landscape |
| **Session Seven** | 1600-1730 | Reflections, evaluation and wrap up |
|  | **1730** | **End of workshop** |

# Annex 3: Post training survey

*Thank you for your active participating in the three-day training on strategic communication and engagement with the private sector. To help us improve on our future training sessions, we would like to get your feedback on your experience. Please take five minutes to respond to these 8 questions.*

1. Was this training relevant to your work?

   ☐ Yes

   ☐ No

2. Did the training provide you with the skills needed to train others and implement learning outputs?

   ☐ Yes

   ☐ No

   Please explain.

   

3. What is your key take away lesson from this training?

   

4. List 3 sessions that were most beneficial in order of priority.

5. List **3** sessions that were least beneficial in order of priority.

6. What additional support would you need to train others and implement the learning outputs?

7. On a scale of 1 to 3, (1= not satisfactory, 2 =satisfactory and 3 =very satisfactory), how would you rate the following?

|  | 1 | 2 | 3 |
|---|---|---|---|
| Materials distributed | | | |
| Facilitation of training | | | |
| Timeframe allocated for the training programme | | | |
| Opportunities for sharing and participation | | | |
| Networking opportunities provided by the Workshop | | | |
| Relevance of content for Communications Training | | | |
| Depth of content for the Communications training | | | |
| Quality of Delivery of Content | | | |

8. Were the training objectives achieved?

   ☐ Yes

   ☐ No

# Annex 4: Local examples of private sector engagement

What role did communication play?

**Case of ILRI- an international research institute**



- **Overall objective?**
    - Use research to help livestock keeping communities adapt to environmental risks and change

- **How?**
    - Develop research-based innovations
    - Index-based livestock insurance

- **Targeted livestock keepers in drought-prone areas**

**What was the communication objective as aligned to the objective of the research program/institution?**



- **Facilitate dissemination and uptake of research product**
  - i.e Promote uptake of the insurance product

- **Stakeholders targeted?**
  - Private sector- Insurance company to offer the product
  - Livestock producers- Buy the product
  - Go**vernment- support the producers**

**Communication activities?**

- **Documented and packaged evidence on the specific product- what is index based livestock insurance? How does it work? Why is it important? How credible is it?**
  - Developed messages targeted at different actors
  - Synthesized research findings for non-technical audience; Research/ policy briefs, illustrations for farmers, videos in local languages

- **Work with team of researchers to identify influencers in private sector**
    - Target insurance companies, started with Takaful Insurance- identify specific influencer ⟶ CEO
    - Message resonated with him (a pastoralist facing challenges as a result of prolonged drought)

- **Developed approaches of engaging the influencers**
    - One on one meeting to pitch idea
    - Provided evidence
    - Leveraged mainstream media to disseminate findings on new product

**Buy-in from Takaful Insurance**

- Piloted the product and rolled out
- First payout- Communications heavily involved in documenting and sharing success (Mainstream media, videos, etc)
- Meanwhile, ILRI continued to approach other private sector partners
- Eventually in 2015, government of Kenya bought in the idea

# Annex 5: Social Media Guide
## The genesis: a response to an expressed need

An online pre-training survey was administered to the participants to understand what the participants thought to be the most important topics to cover in our training session. The Pre-Training assessment was created to ensure that the participation of the respondents in the upcoming training is maximized and that the training delivered an effective, customized learning experience that will respond to their needs and experiences. From this pre-training survey the needs of the participants were assessed

The needs assessment report indicated that the participants of the training mostly used reports, emails and phone calls as the main mediums of communication. This presented a gap in digital communications providing us with the premise for the digital media section of our training.

Majority of the respondents indicated that they use social networking sites for personal use with large preference for Facebook, Linkedin, Instagram and twitter respectively. They mostly use these platforms to communicate with close friends and family with majority of them never engaging partners and donors online.

This provided the basis for the creation of this social media guide that would help the participants better understand and use social media in their work and in collaborating with the private sector

Social media is all about relationships and much like offline relationships, the value of your online relationships is based on the time you invest in building them. While most people may not be able to spend hours on social media every day, if they are strategic about the time we do invest, the results can be huge and transformational. The secret is to find and build your clique – the people and organizations that care about the issues you care about and engage about the topics you want to engage in. Instead of blindly casting your net into the vast special media ocean, for example, you can find and enter smaller rooms where people are having conversations that you can contribute to and influence

# Join & Build the Conversation

Using hashtags allows you to join, share and shape the space around the conversation.

Search for the interested hashtag/topic to find out what others are saying/sharing.

Contribute by engaging with others to the conversation.

Invite your friends, followers, partners, and networks to join the conversation. (You can mention/tag them individually or send direct messages to those who follow you.

# Amplify Voices

Share other people's content and credit them in your posts.

Regularly check the topics/hashtags and share the valuable content to increase its reach.

Invite others who are posting about similar issues to join the conversation.

# Build your tribe

Find your tribe– create a list of all the people and organizations you interact with online

Build your tribe– By creating this list you already have your band of thieves who will push the agenda and share each other's content whenever given the chance

Participate in the chats, webinars and other social activities that engage the people in your tribe

# Social Media for beginners

Social media regardless of the platform has some similar rules that if followed can help build your online presence to be as influential as you want to be. The following 10 points will enable you to empower your digital media and use it to further build your online networks

- Content will always be king! Share your best content and Give your followers content that they'll want to share/engage with. Ask yourself, "Would I like and share this if I didn't work for this organization?"

- Personify your Social media accounts. People connect with people and not with institutions. Give your organization a human touch, define your voice, and remain consistent.

- Create a list of at least 30 strategic partners and friends that are likely to share your content. Consistently engage them in sharing their content and engaging them in conversation

- Use images in your posts whenever possible, as images are more visually appealing and they generate higher engagement.

- Create a list of at least 10 influencers that  follow you. These are your social influencer ambassadors.

- Mention each other in posts to increase engagement

- Share your tribes Calls-To-Action (Follow/Like our social media pages; join our twitter chats).

- Use a social media management tool like www.Tweetdeck.com or www.Hootsuite.com and create a column to track any relevant conversations.

- Create a list of at least 10 influencers you would like to enroll in supporting your work. Begin to build relationships with them by engaging with their content first, and then sharing your content with them next.

- Finally, analyze your social media activity and grow. At least once a week (if possible once a day), check your social analytics to gauge how your posts are performing based on number of impressions, engagements, and new followers gained.

- Learn from this information and insights to improve your strategy.

# "

# Use images in your posts whenever possible, as images are more visually appealing and they generate higher engagement.

# "

# Social Media Platforms

Social media is the collective of online communications channels dedicated to community- based input, interaction, message -sharing and collaboration.
for researchers we have 3 ways of using the platforms in profile curation, discussion and content creations
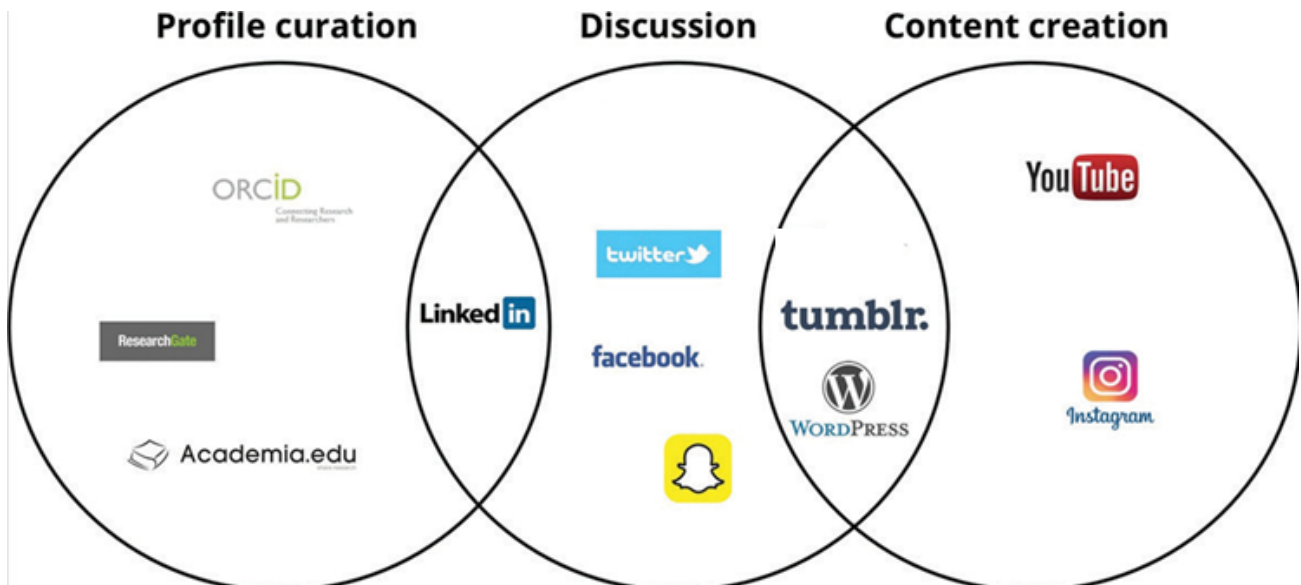


Profile curation refers to platforms which primarily host a public profile of the user.

*examples include Academia.edu, Orcid, Research gate*

Discussion platforms are avenues for dialog and comments.

*examples include: Facebook, Twitter, Snapchat*

Content creation platforms are used for creating content about the researcher and their research.
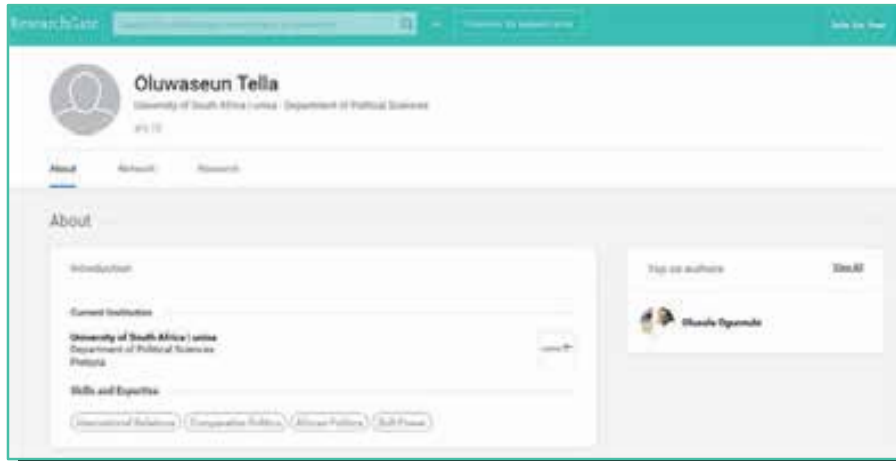
*examples include: YouTube, Instagram*

# R<sup>G</sup> Research Gate
# Twitter

**Open Account > Connect with Peers > Share work**



## BEST PRACTICE

- Share papers
- Ask & answer questions

### Tagging



*Tagging allows users to increase their reach without having to include the names on the tweet*

### Hashtags

*Twitter users put hashtags in their tweets to categorize them in a way that makes it easy for other users to find and follow tweets about a specific topic or theme*

### Threads



*Threads have become popular because they allow for more space, which allows for more context and thought than even a 280-character tweet. In a world where nobody seems to believe anybody, a little extra space to explain can be invaluable.*

# Twitter

| No of users | Best for | Audience type |
|---|---|---|
| *6.8 Million (Africa)* | *Real time content & interaction* | *Varying* |



## BEST PRACTICE

▮ *Choose a short user name!*

▮ *Look for hashtags used in your field*

▮ *Use URL shorteners like bit.ly to help save space when you are sending links.*

## Tagging

*Tagging allows users to increase their reach without having to include the names on the tweet*
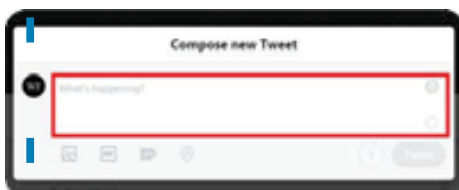


## # Hashtags

▮ *Twitter users put hashtags in their tweets to categorize them in a way that makes it easy for other users to find and follow tweets about a specific topic or theme*



## Threads

▮ *Threads have become popular because they allow for more space, which allows for more context and thought than even a 280-character tweet. In a world where nobody seems to believe anybody, a little extra space to explain can be invaluable.*

**Best for**
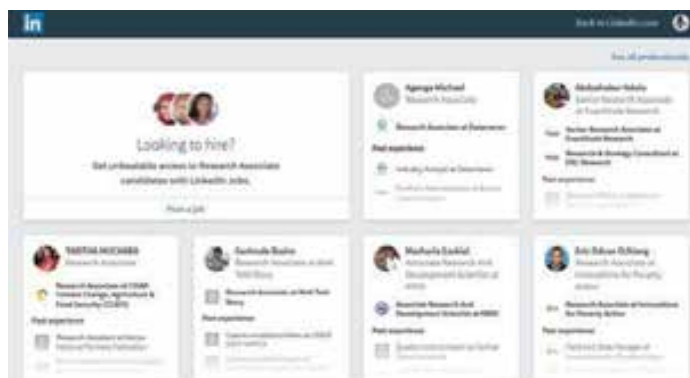Business & employment oriented
social networking service

**Audience type**
Professional networking

# Linked in

**Best posting times:**
Mon - Fri, 7am - 8am and 5pm - 6pm
Tue between 10am - 11am

**No of users**
467 million users

**Best for**
Business & employment oriented
social networking service

**Audience type**
Professional networking



## Best practice: Network

**Best posting times:**
Mon - Fri, 7am - 8am and 5pm - 6pm
Tue between 10am - 11am

### Best practice: Profile



Njuguna Makau
Regional Coordinator at Global TB Caucus
Global TB Caucus • United States International University
Kenya • 301

## Best practice: Network



Create a network of colleagues &
professionals in your field from
whom you can seek advice;

Stay in touch with past and present
colleagues;

- Create a network of colleagues &
professionals in your field from
whom you can seek advice;

Discover connections when you're
looking for a job;

- Stay in touch with past and present
colleagues;

Recommend and endorse others;

- Discover connections when you're
looking for a job;

Receive recommendations from
colleagues;

- Recommend and endorse others;

List your skills and experience; and
join groups and participate in
discussions

- Receive recommendations from
colleagues;

- List your skills and experience; and
join groups and participate in
discussions

▌ Add a professional-looking
photograph of yourself.

▌ Customize your profile's URL to
include your name

▌ Be sure to share your
publication list,

# Yammer

Yammer is an enterprise social network; this means that unlike other social media sites such as Facebook or Twitter – which are designed for public use – Yammer is designed for private communication for members within a given organization. It is a social network for businesses and companies.



TM

## Opening an account

If you're creating a Yammer account for your business, you'll need a valid company email address. You'll be sent a confirmation email and then you can log into the Yammer system.

If you're being invited to join a Yammer network, you'll receive an email from the network's administrator; follow the link, and you'll be directed to Yammer's main

## Feeds

Officially, Yammer refers to all communications that take place on the site as "Yams". Yams are sorted into various feeds. A feed, if you're new to social media, is a way of grouping certain kinds of messages.

You can customize Yammer to show the feeds you prefer in any order from Sent, Received, Liked, Book-marked, All and Groups



## Yammer Etiquette
- Proof read your posts
- Observe Network culture in tone and language
- Be careful of what you post, the internet never forgets. If
- a conversation digresses from the main topic it is best discussed in the private messages.

## Video sharing platforms

Videos are an important part of social networking. They allow the content creators to share their work and extend the life of the event or project. The most famous video streaming platform is YouTube. This video platform has 2.9 billion views in a month and is best used for video streaming and sharing.

Video sharing platforms include:

## Messaging platforms

With research studies on the rise, it is only a matter of time before secure text messaging is used in these studies to increase effectiveness. Secure text messaging can aid in reaching the greater population and in networking with other fellow researchers. Platforms like telegram allow the users to share various types of large files making the platform convenient for sharing data and information securely.

Some of the platforms include: Telegram

## Photo sharing platforms

Many researchers may feel that image sharing platforms will not fit well into their online communication strategy, which focuses on words, academia, nuanced research terms and ideas. Images are global and can be understood despite the difference in languages they are easily distributed, and they are easily digestible which is why researchers need to start using image sharing platforms to enhance their communications.

Some of the platforms include: flickr Pinterest

## Scheduling tools

These are tools and applications that are used to schedule and post content on the different social media platforms that are used.

Some of these tools include:

TweetDeck hootsuite buffer sproutsocial

# Collaborative platforms

These are platforms that allow users to partner and collaborate in projects. They give access to data and information to all parties involved. These collaborative platforms can be used to share data or allow the input of data by different people in different organizations. They can also allow assignment of tasks and tracking of project progress based on the assigned tasks. These platforms vary in use and features.

These collaborative platforms include:

# Always remember:

- The internet never forgets. Even if deleted the internet has a great memory and will always have a copy of the same information.

- Do not post any information you might feel to be too personal about you.

- Always do a first draft of every post to be confirmed before uploading. Remember the internet never forgets.

- Never post anything while emotional or worked up.

- Set aside some time to regularly work on and share social media posts and content.

- You are limited by your own creativity; social media is a place where one can build relationships and followings beyond the workplace settings. How you share your content, engage and maintain your audience is only limited by your imagination.

- Images work better. Images are worth 1000 words and this is true when sharing content. Images can easily attract and set the context for your content before a reader dives in to the read.

# Annex 6: Facilitation Tips and Games

## 1. Altitude

**Objective of play**

Sometimes it can be difficult to keep a meeting on track when people have a hard time staying focused at the right level. People can find themselves "down in the weeds" or operational details when the meeting is supposed to be strategic, or, conversely, they can find themselves being too abstract and strategic when operational detail is exactly what's needed. You can use Altitude to agree on expectations and keep people focused at the right level to serve the goals of the meeting.

**Number of players**

Any number of people can play this game.

**Duration:** 5 minutes.



**How to play**

1.    Create a chart like the one shown here.

2.    Give everyone a sheet of paper. Ask, "Who knows how to make a paper airplane? and ask for a show of hands. If there are people who don't know how, either show them or ask someone at their table to do so. Now ask everyone to make a paper airplane. If time permits, you might offer them a chance to test their planes to make sure they fly.

3.    Reveal the altitude chart and ask the group to define what they mean by the satellite level, or the airplane level, and the ground level. For example, if people say that the satellite level is too high, but the ground level is too detailed, ask them for examples of the kinds of things that they would consider at the right altitude. Then ask them for examples of things that would be too low or too high.

4.  When you have reached some consensus on the right altitude level, put a mark on the page to represent the "right" altitude.
5.  Now tell people that whenever they notice the conversation going too high (abstract, vague, strategic) or too low (down in the weeds, tactical, operational) they can float their airplane and that will be a signal to the group.

**Strategy**

Meetings often go off track when someone pulls conversations into the wrong "altitude." When this happens people often tune out, or even leave. In most meetings there is no simple, easy feedback mechanism people can use to keep the meeting on track. Giving people such a feedback mechanism (and making it fun) makes it easier for people to weigh in, keeping the meeting on track.

# 2. Hero's Journey Agenda

**Object of play**

The Hero's Journey Agenda is a unique and different way to lay out the agenda for a meeting or workshop that creates a sense of adventure and builds anticipation for the meeting.

**Number of players**

One, usually the facilitator, created live in front of a group.

**Duration:** 10-15 minutes.

**How to play**

I am going to give you a script here, based on the video above. But this exercise works best if you make it your own, using a story you love and that you feel your audience will be familiar with, like a favorite fairy tale or movie.

1.  Draw a large circle on a whiteboard or flip chart. Tell people,

"This circle represents all the things we're going to do today. We're starting out up here (point to the top of the circle), and we're going to take a hero's journey."

If you have geeks in the room, can talk about it in terms of Star Wars, or Lord of the Rings, or another story you expect the group to be familiar with.

You can also say,

"Any story, any epic adventure follows this basic format. This is something that a guy named Joseph Campbell came up with. He wrote a book called The Hero Of A Thousand Faces, which you can look up. Basically, the hero's journey works like this. You begin in ordinary life. This is where everyone is coming into a meeting. We're actually in our ordinary lives right now, and we're going to do some special work and we're going to be moving outside of ordinary life."

2.   Draw a stick figure at the top of the circle. Now say,

"The hero's journey basically has two big components to it. There is the known world, which are the things that we kind of already know, the regular work and so forth. There's the unknown, which are the things that we hope we will discover and explore during this meeting."

Draw a wavy line to represent the boundary between the known and unknown. "This is called the threshold. It's the threshold between the known and the unknown.

3.   Now say,

"Here we are on the hero's journey. The first thing in the hero's journey is the call to adventure. That is where we talk about things like: What are we going to do? What's the work that we're going to do? Why is it important? What brings us to this point?

Write "The Call" at around 1 o'clock on the circle and talk about the purpose of the meeting. You may want to ask people why they came and what their expectations are.

4.   Now draw a couple of stick figures at around 2 o'clock, and say,

"You're going to find in the beginning of any story, you're going to find the helpers and the mentors. You've got, whether it's Dumbledore or Gandalf or Obi Wan, whoever that character is, the droids, the characters that are going to help you. These are the characters that are going to help you find your way."

Helpers can be things like teaching people how to use sticky notes in a certain way. There are a lot of Game storming tools in this category. We call them openers. So you can tell people "We're going to meet our helpers and mentors." Those helpers might be tools, or people, experts that we might bring in. It could be a keynote speaker.

5. Next you will talk about crossing the threshold between the known and the unknown.

"Now, where we cross the threshold, that's usually a good time for a coffee break. It's the end of the morning, coffee or tea, depending on what country you're in. Maybe both. We're going to have a break."

You can draw a coffee cup or a teacup here.

6. Now say,

"Next, we're going to start getting into the trials and tribulations. We call this problems and pitfalls. It's the part of the journey where you're exploring the problem space."

There may be all kinds of activities or things that you're going to do here. You might be brainstorming, you might be working stuff out, might be drawing a map of the system. There are a bunch of things that you can do to explore this problem space. In a story, you're going to find all kinds of challenges: you must climb the mountain, you must fight the trolls, all the things that must happen to move the story forward.

Write the words "Problems and pitfalls," and draw some explosions here, or barbed wire, or something representing problems and pitfalls, at 4 and 5 o'clock on your circle.

7. Now write the word "Pit" and draw a pit at the bottom of the circle. The pit, in a day-long meeting, might be lunchtime.

"Every story has its pit. The belly of the whale, the cave. I just call this the pit. We've hit the bottom. This can be a tough space to be, because we've just opened all these problem spaces and issues and things that we must deal with. It may feel like we're never going to get home. The pit is also the place here Bilbo Baggins finds the ring. It's the place where the deep reflection, the real powerful learning can also happen. Over lunch might be a good time to explore what is down here in the pit. What are we feeling like? What are the emotions?"

8. Now write "Powers" and draw some stars, or a superhero stick figure with a cape, something that represents powers, around 7 or 8 o'clock, and say,

"We come out of the pit after lunch and we're creating new powers. We're solving problems. We've learned how to use the force. We're now solving problems, we're

creating solutions, we're working on things together. These kinds of tools we might be using here would be customer experience map, service blueprint, we might be designing, we might be prototyping a product. This is where we're actually getting cool results out of the meeting, but we still have to take that back to work."

9.  Now write "The return" at around 10 o'clock, and say,

"That's part of the hero's journey, too, the return to ordinary life. We have to go back and cross the threshold again. This time is all about those powers that you're bringing back. We want to come back to the workplace with gifts. Think, new ideas, new thoughts. We want to spend some time thinking about, "How do we take this back to work?""

This is the part of the meeting where you make some time for the group to think together about how they are going to bring the new ideas from the meeting back into the organization. What am I going to do in my next meeting? How am I going to explain this to my team? You might work on the PowerPoint together or work on some documents that are about sharing what you actually did during the meeting.

10. At this point you can close the exercise by asking people if they have any thoughts and additions before you proceed with the meeting.

Here is an example of a completed agenda:
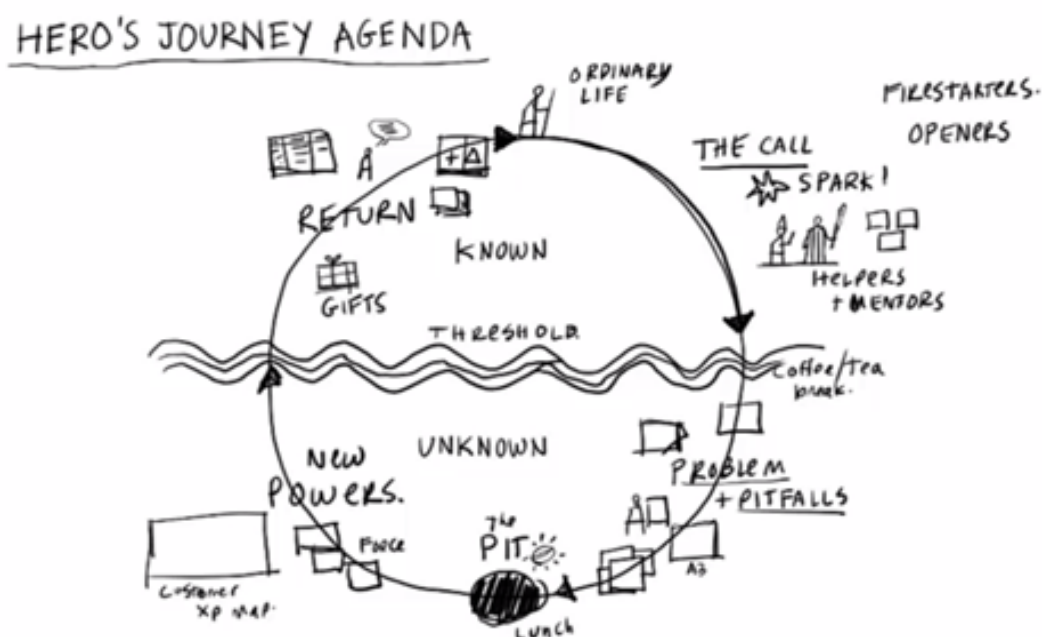
**Strategy**

This is a very powerful way to set up an agenda for a relatively large-scale session of work. Spend some time upfront on this. Draw it out and talk through it with key stakeholders, either before the meeting or at the beginning of the meeting. It is also a good litmus test to help you think through the goals of your meeting. If you can't answer questions like, "What's the call to adventure? What are the problems we want to explore? What are the things that we want to find? What are the things that we want to bring back to work?" and if you can't sort of think these through at the beginning of a meeting, then it's legitimate to ask yourself, should we really have this meeting?

The Hero's Journey Agenda seems to work really well, not only for designing the agenda but for making sure you have all the major bases covered and creating positive energy and enthusiasm for the whole endeavor.

## 3.  The long table

The Long Table is a dinner party structured by etiquette, where conversation is the only course. The project ingeniously combines theatricality and models for public engagement. It is at once a stylized appropriation and an open-ended, non-hierarchical format for participation. Both elements – theatrical craft and political commitment – are mutually supporting in this widely and internationally toured work. The (often-feminized) domestic realm here becomes a stage for public thought.

## 4. Squiggle Birds

Squiggle birds is a quick exercise that you can use to get people stretching their visual thinking muscles. It takes about five minutes and quickly, clearly demonstrates how little effort is really required to make meaningful, easy-to-read images. The main point of the demonstration is that our minds are already pattern-making machines, and very little drawing is required to convey an idea. The mind will fill in the rest.

# 5. Carousel

**Object of play**

This game has been designed to gather facts and opinions from the participants on different aspects of the issue at stake. It will help gain and share insight from all points of view, since everyone will have had the chance to contribute.

**Number of Players:** Up to 50

**Duration of Play:** 15min to an hour depending on the amount of participants

**How to Play**

1. Prepare 5 up to 10 flip-charts where you address different aspects of the topic at hand. On each flip-chart you address a certain aspect of the issue by posing a powerful question about it, these questions should be impersonal and ask for facts and opinions. Focus on "what", "when" and "how" questions.

2. Spread the flip-charts through the entire room, making sure there is enough distance in between to allow group discussions between participants without disturbing the others too much.

3. Quickly introduce the topic at hand and go through the questions of each flip-chart, making sure everybody understands the questions correctly.

4. Ask participants to split into pairs, or groups of up to 5 people if you have a bigger group. You should have one group per flip-chart/question.

5. Ask each group to answer the question by adding their ideas, facts and opinions on the flip-chart either with images, writing or post-it artifacts in a way that it is possible for others to interpret the data presented.

6. Give each group 2-3min time to add their information and rotate to the next flip-chart (clock-wise or counter clock-wise)

7. Repeat until each group has answered all the questions.

8. Give the entire group another 5-10min to review all generated content and move to the next step: prioritization and/or deeper research into some of the ideas generated.

**Strategy**

By limiting the time a group has to answer a question you will make them focus on the most important things. The idea is not to gather all information per participant but to gather meaningful information as a group. This gathered information will form the basis for a prioritization and/or deeper research into some of the ideas and opinions.

# 6. Code of Conduct

**Object of Play**

This game has been designed to help set the right culture in a group of people and help build mutual trust. It will empower all participants to act upon the results of this game.

**Number of Players:** Up to 30

**Duration of Play:** +/-30min

**How to Play**

1. You write down the words "Meaningful" and "Pleasant" in the middle of a flip-chart or whiteboard.

2. You aks everybody in the group to shout out what they believe is necessary to make sure this meeting or workshop will be meaningful and pleasant.

3. As participants are providing thoughts and ideas, you record the information given in a mind-map structure.

*Note: Preferably by using images instead of words.*

4. Quickly pass by each of the ideas recorded and make sure everybody has the same understanding of the idea at hand. If necessary adjust the item to avoid misunderstanding. = Values within the group.

5. Now go back to the first item addressed and ask the participants how they believe would be a good way to make sure this idea is carried out during the meeting or workshop. Record the items attached to the given value addressed. = Actions.

6. End the game with pointing out that this code of conduct that the group just created needs to be upheld by everyone. Every participant has the responsibility to make sure everybody in the group respects this code. = working agreement.

7. Optionally: You could ask people if they want to take ownership of one of the actions registered.

Note: Be aware that this may cause a typical human reaction from the others: "It is this person's problem to monitor, not mine anymore".

**Strategy**

Make sure everybody contributes to the making of the mind-map. If you believe the group is not strong or comfortable enough for this, you could substitute the shouting of ideas by letting everyone write down their ideas in silence combined with an affinity map to achieve similar results that can be recorded in the mind-map. It will take some time to create this shared code of conduct, but it will help groups of people where there is little to no trust and openness to break through the initial barriers.

# 7. Impromptu Speed Networking

### Object of Play

Ideal activity for flex points in a gathering (the beginning, when coming back from lunch, at the end of the day). Give everyone at a gathering an opportunity to "get there" mentally by engaging with the purpose/subject. Give everyone a significant amount of "air time" so that everyone's voice is in the conversation (no matter how many participants, everyone 5-10 minutes). Energize participants and get oxygen to the brain by standing and moving physically).

### Number of Players

Unlimited. This activity "scales" well from a minimum of around 12 to thousands.

### Duration of Play: 20 minutes

### How to Play

1. Invite everyone to leave their "stuff" and move to an open space in the room where everyone can stand and there's room to move around.

2. Pose a juicy question that is directly related to the purpose of the gathering.

3. Ask everyone to reflect on the question silently for a full minute

4. Explain the simple rules;

– When you hear the chimes, find a partner (someone you know less well than others is more interesting). If you're looking for a partner put your hand in the air so someone else who needs a partner can find you easily.

– Have a 5-minute conversation about the question.

– When the chimes ring again, find a new partner (remember the hand up trick) and have another conversation.

– When the chimes ring continuously, stop and find out what happens next.

5. Three 'rounds' of the process are usually good.

6. At this point, there are many possible variations for a next move. Two possibilities: (1) Invite everyone to sit back down and start the next part of the gathering. (2) Invite partners to hook up with one or two other pairs and sit down in a knee-to-knee circle and talk about what struck them about the conversations.

### Strategy

Debrief this process in addition to harvesting the content from the discussions. Invite participants to reflect on what it was like to have the conversation using this process. Things they might notice include: How starting a meeting standing up builds rather than drains energy, how having several iterations of the same conversation with different partners changes understanding, and how questions open up more space for creative thinking than presentations. The goal is to introduce participants to the pattern language of these generative processes.

# 8. Talking Chips

**Object of Play**

A recurring challenge in group work is managing discussions so that every individual has a chance to contribute, and no individuals dominate the meeting. By using simple "talking chips" as a currency for contribution, a group can self-manage the flow of participation.

**How to Play**

1. Before the meeting starts, each participant draws a chip (poker chip, coin, or similar) from the center of the table.

2. A participant places his chip in the center to speak. Once all the chips have been placed in the center, participants may remove their chips from the center to speak in the same manner. The process repeats.

**Strategy**

Talking chips make the value of everyone's contributions tangible and give everyone a chance to speak. They are just as effective at drawing out otherwise quiet participants as they are at containing dominant ones.

# Annex 7: Resources for further reading and reference

**Audience mapping:**
- https://www.slideshare.net/CharityComms/audience-mapping-drawing-on-your-own-internal-expertise-audience-strategy-conference-26-may-2016
- https://www.resultsmap.com/mapping-out-your-audience-terrain/

Toolkit for communications monitoring, evaluation and learning:
- https://onthinktanks.org/resources/communications-monitoring-evaluating-and-learning-toolkit/

Group exercises (energizers) to use for meeting facilitation

**Communication revolution:**
- https://onthinktanks.org/articles/seis-communications-revolution-part-1-rebranding/
- http://www.oxfordbibliographies.com/view/document/obo-9780199756841/obo-9780199756841-0007.xml#obo-9780199756841-0007-div1-0002

**Using social media to communicate your science:**
- http://blogs.lse.ac.uk/impactofsocialsciences/2017/05/03/science-communication-and-social-media-from-iconic-nasa-moon-landings-to-instagramming-astronauts/
- http://blogs.lse.ac.uk/impactofsocialsciences/2015/07/30/online-engagement-strategy-dont-go-it-alone/

Social media toolkit- Specifically developed for this training course:

**How to plan for your communications**
- https://ic.gc.ca/eic/site/oca-bc.nsf/eng/ca02491.html

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The Beginner's Guide To Social Media

Marc Georges - https://mashable.com/2012/06/12/social-media-beginners-guide/#jRhiADetd8qQ

5 Ways Secure Text Messaging Improves Health Research Studies http://www.mosio.com/5-ways-text-messaging-improves-public-health-research-studies/

10 Ways To Use Social Media To Get Your Research Noticed https://www.timeshighereducation.com/blog/10-ways-use-social-media-get-your-research-noticed

How Academics and Researchers Can Get More Out Of Social Media

Lina Duque - https://hbr.org/2016/06/how-academics-and-researchers-can-get-more-out-of-social-media

The Use of Social Media to Combat Research-Isolation

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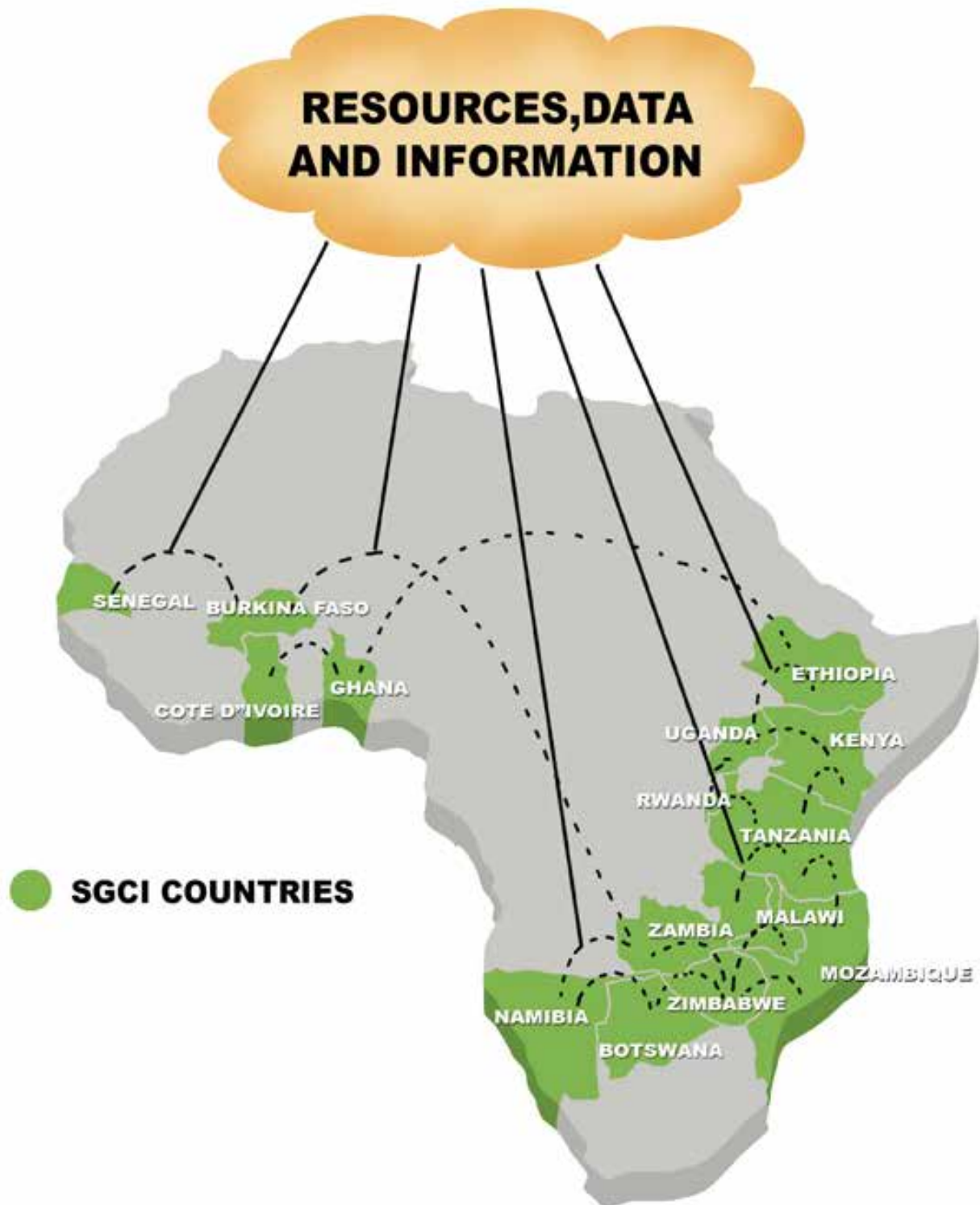
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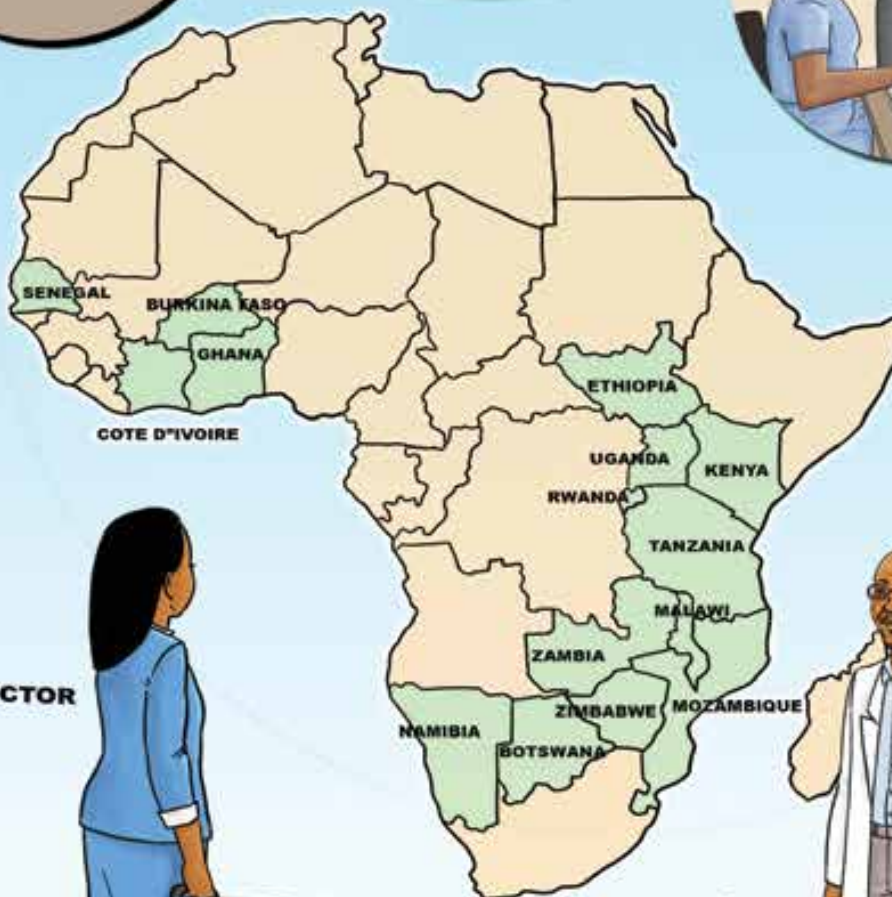
Social Media Is More Than Simply a Marketing Tool For Academic Research

Amanda Alampi - https://www.theguardian.com/higher-education-network/blog/2012/jul/24/social-media-academic-research-tool

Using Yammer Effectively Tips and Uses

https://www.chorus.co/filters/news/using-yammer-effectively-tips-and-uses/

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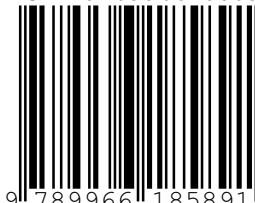
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