RTAC Webinar #3 Transcript

Capturing Attention:

How to Use USAID's Research Translation Toolkit's Communication Products Section

March 2, 2023

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Julie MacCartee: So, welcome everyone. My name is Julie MacCartee, and I am a program officer with the Research Division within the Innovation Technology and Research Hub at the U.S. Agency for International Development, or USAID. We're delighted to have you all joining today for an in-depth look at the Communication Products Section of USAID's Research Translation Toolkit, which was developed under USAID's Research Technical Assistance Center, also known as RTAC. RTAC supports USAID's Missions, Bureaus, and Independent Offices to make evidence-based decisions. And the project is funded by USAID and led by NORC at the University of Chicago, with PRB as a core partner.

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Julie MacCartee: This is the third in a four-part webinar series on how to use this toolkit, so if you couldn't attend the first two webinars, you are welcome to go back and watch the recordings, which offer a comprehensive overview of the toolkit and an in-depth look at the stakeholder analysis section, respectively. And we'll make sure that we share links to those recordings and all of the other resources related to this webinar series, both during the webinar and in the post-event email that you will receive.

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Julie MacCartee: Before we get started, just a couple of logistical points. Since we've got a nice crowd today, we are not going to be using participants' videos and microphones, but we will be using and monitoring the chat box throughout the webinar. So, we invite you to introduce yourself in the chat box by entering your name, affiliation, country, and/or why you joined this webinar today. And you're welcome to use the chat box at any time to engage with participants, provide links and suggestions, links to your favorite communication products that you've seen or created.

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Julie MacCartee: You can also send messages privately to participants. But keep in mind that the webinar organizers can see those private messages in the chat transcript at the end of the session. So, but, we encourage you to send your messages to everyone. So just take a look at the "To" line on the chat box and make sure that it's selected to send messages to everyone. Although we'll be using the chat box, we also want to use the Q&A box to enter any questions you have about the toolkit. This will just help us keep all questions organized and be able to respond in order. So please use the Q&A box.

We'll answer some questions along the way, and we'll also have plenty of time at the end of the webinar to address any of your questions.

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Julie MacCartee: Lastly, as I mentioned, after today's webinar you will get an email with the slides, recording, and other resources, and you can also access these resources at any time on the website for the toolkit and the webinar series. Also, as I mentioned, today's webinar is the third in a four-part series on how to use USAID's Research Translation Toolkit.

As a reminder, this toolkit is a comprehensive standalone resource that can be used by anyone who wants to bridge the gap between research production and research utilization. It's divided into three sections: stakeholder analysis, communication products, and creating a research-to-action plan.

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Julie MacCartee: And for your reference, we will share a link to the Research Translation Toolkit and to a fact sheet that gives a quick snapshot of the toolkit in the chat box. So again, this toolkit can be used by anyone. You're welcome to use it yourself, forward it to your partners, change things about it as you wish. We want it to be useful to you.

But then, zooming in on today's webinar, today we will discuss what the Communication Products section of the toolkit covers. We'll explain why, when, and how to use this section to ensure that your research findings are seen and used to inform policies, programs, and practices. We will hear from a guest speaker Anneka Van Scoyoc from PRB, who will take us behind the scenes of the design process for creating a communication product.

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Julie MacCartee: And again, throughout today's webinar, we encourage you to engage with your practice or your fellow participants in the chat box and add any questions you have to the Q&A box.

With that, I will now turn the mic over to Gorrety Parmu from PRB to lead us through a quick exercise to help frame where we're all coming from before we move on to the main part of the webinar. Gorrety is a policy adviser in the International Programs Department at PRB, and she provides technical support to country level activities, promoting evidence, policy advocacy in the broader sexual and reproductive health rights space. She joined PRB in 2020 and she's based in PRB's Nairobi, Kenya office. So, we're excited to have you joining today.

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Gorrety Parmu: Thank you, Julie, for that elaborate introduction. I am going to keep my video off during the presentation due to bad feed, and bear with me for that reason. Before we delve into the broader communication products section, we want to hear about one challenge you or your institution face when it comes to sharing research, insights, techniques, or innovative products with stakeholders in a way that is accessible. Again, what is one challenge you face when communicating your research? You're going to see a link in the chat where you can respond to this question, and just by in mind that all of your answers will contribute to a word cloud, so the bigger and bolder words are those that are mentioned most often. Your responses will also help us get a sense of the common challenges that are faced among today's participants.

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Gorrety Parmu: I would let you know that since you're limited to only one word in the response, please feel free to hop in the chat and elaborate on your responses if you would like to do so. And we can take a minute, or two to respond to that. I see some that's coming in already.

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Julie MacCartee: I love that someone put hyphens between some words to try and get three words into one! Very creative. Yeah, the “summarizing key findings.” And, technically, it will accept more than one word, but keeping it short is helpful.

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Gorrety Parmu: Definitely. I see a lot of people commenting about “jargon.” And I see “languages” popping up. And remember, as I said earlier, that the bigger and bolder words are those that are mentioned by the majority of you. So, I see a lot of people talking about languages, and we would love, if you can, elaborate in the chat.

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Gorrety Parmu: I see in the comments Susan Davies, you said, “The inevitable ‘more research is needed’ which doesn't lend confidence to conclusions.” And I see “inapplicable” in the comment section as well. Oh, someone is asking if you can share the link here, I said. All right, please keep that moving. Keep that coming as we progress into the slides, and I see we have common challenges across the board, but we are also fortunate that the Communication section of this presentation will help us answer or address some of these challenges that you've highlighted in the, in the world cloud.

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Gorrety Parmu: Move to the next. Thank you. So, the Communication Products section is the part of the toolkit that can help you turn your data into compelling story for your stakeholders. In this case, stakeholders are individuals or groups who influence or are influenced by your research, either directly or indirectly, and also those who have interest in your research, including the end users. So, your stakeholder might be a funder or a policymaker or another researcher, or a civil society organization who could potentially benefit or influence the kind of decision that you would like to see made.

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Gorrety Parmu: So, communication products, on the other hand, will include things like fact sheets, policy briefs, infographics, blogs, and short videos. While the toolkit focuses on certain communication product types that tend to be more relevant to the research process. These are not on the only types of communication products. So, transforming your data into a story for your stakeholder is a process, and it involves defining your audience, developing main messages that we're going to talk about in in more details as we progress through the presentation, and selecting a format that will get your audience excited about and motivated to use your evidence.

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Gorrety Parmu: This communication section also covers the practical aspects of planning and working with communications, professionals to develop the right communication products that can speak to your audience. So why should you use this section of the toolkit? Here a few main reasons why: You might want to use it to help you understand how you can turn your data into an engaging story, because stories can move people. Or perhaps you want to carefully tailor your messages to your audiences' interest, and this will also tie into other sections of the webinar that talked about getting to know your audience, and knowing the interest in their priorities in order to be able to craft a message that best speaks to them all. You might just want to use it to choose the best format for your product, the one that will most effectively capture your stakeholders' attention.

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Gorrety Parmu: Whichever the reason is, each of these tasks, guided by the toolkit, will help increase the chances that your research will be used, and that is the goal.

So why should you? Can you go to the next?

There are a lot of reasons why it is important that you create a good communication product. A powerful communication product can help you clearly explain your research findings. It can also help you share evidence-based recommendations that your stakeholders can act on. It can also help you inform budgeting decisions or policies and program designs. And lastly, it can help practitioners like you make improvements on the kind of work that you're doing, whether that be policy facing or programmatic work that you're doing.

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Gorrety Parmu: You may recognize this graphic from the first webinar when the presenter walked you through where in the research process you can use the various sections of the toolkit. For this presentation, and as specifically to the communication section –uh—products section, we've modified it to focus on where in the research process you could use the communication product section to maximize the uptake and impact of your research findings. We have found that it is best to use this section when you have significant data to support your claims. You also want to make sure that you have clear results, actionable evidence- based recommendations to use this segment of the toolkit. That means that this section will be most helpful and important during the analysis and write up stages, and also the dissemination and follow up stages of your research. So, bear that in mind.

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Gorrety Parmu: The communication products section guides you through five main steps to delivering an effective product. We'll go over each of these steps in more details in the coming slides. But first you want to make sure that you identify the communication objectives. And once you have identified your communication objectives, you want to identify and narrow down on who you want to communicate these objectives to, or who these objectives apply to. And then you want to identify what are the messages that you want to communicate to this audience.

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Gorrety Parmu: And once you figure that part out, you want to make sure that you're using accessible language, and we'll talk about accessible language in a bit. But you want to make sure that your language is one that your audience can identify with, and you can easily understand. So, once you have all those full steps figured out and laid out, you will then identify resources and develop the product. And I think part of the developing the product is where our guest speaker will come in to walk you through.

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Gorrety Parmu: So, the first in the five steps that I just mentioned in the previous slide is identifying your communication objectives. Communication objectives are important because they describe your purpose or reason for sharing information with target audiences. They are your goal when you're sharing your evidence. This step is very crucial, and it will provide—when you do it well—it will provide you with the overarching framework for all the steps that follow, and then ensure that your final communication products will help you achieve your goals.

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Gorrety Parmu: A good objective should be specific, should clearly flow from the research results, and should be directly linked to the intended audience.

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Gorrety Parmu: An example here is that the communication objective might be to share evidence with the national leaders about why adults and reproductive health is important to help us see Vision 2030 Development Goals. And you will notice that we added the other segment of the "Kenya Vision 2030 Development Goals," which would speak to some of the conversations that you have had in the previous section with the previous webinar session on stakeholders. Understanding your stakeholders, knowing what their interests and priorities are, and trying to match your goal to not just be something that is a standalone, but something that complements or helps contribute and achieve that goal. And that's why you see the kind of Vision 2030 Development Goals coming in.

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Gorrety Parmu: We— To help you navigate this process and articulate your communication objectives more clearly, there is a worksheet that provides probing questions to help you determine your communication objectives.

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Gorrety Parmu: This worksheet is also used in step two, which is the audience segment, and helps you connect the first two steps in the process of developing your communication product.

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Gorrety Parmu: Step 2 is identify your audience. This step is another important one, because it ensures that you tailor the content and format of your communications specifically to that audience. Tailoring the content increases the chances that they will understand the relevance of your evidence and apply it to their work. So, this step in the toolkit includes questions to help you clearly define who your audiences are, including segmenting it into primary and secondary audiences, and then understanding that interest and influence.

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Gorrety Parmu: I want to take us back and remind us that this section also complements, like I said earlier, the stakeholder analysis section of the toolkit, which has more information on identifying primary and secondary audiences. Julie had mentioned in— during the introduction that a link will be shared to the previous webinar sessions. The recording of that previous section is also available on our event website, and the link can be dropped in the chat as well for your convenience.

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Gorrety Parmu: So, you will notice that this is the same worksheet that we used for step. And so, in step— this what— this same worksheet will help you identify your audiences, what you know about them, and then divide them into primary—those who are going to directly affect or bring about the kind of change that you want to see—and then secondary audiences—who might be individuals or institutions that can influence your primary stakeholders. Having knowledge about this will help you make connections between why you want to share your research results and with whom.

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Gorrety Parmu: And I want to give us an opportunity to share in the chat here. If any of you have ever had an experience where really knowing your audiences made your communication products more impactful, please take a minute or two to let us know in the chat. Again, the question is, "Have you ever had any experience where really knowing your audience made your communication products more impactful?" Please feel free to put your responses in the chat. Alright, we will move forward, but please for free and at any point during the presentation, to put in your point in the interest of time, I will progress to the next slides.

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Gorrety Parmu: So, in Step 3, you will craft main messages that you want to convey to your audience. Your audience should be able to read and grasp these messages quickly and easily. Main messages signal to the reader exactly what they're supposed to learn or take away from your communication product. So, your messages should be clear and simple and capture the essential points you want to make.

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Gorrety Parmu: The story you're telling with your audience falls in three main parts. The first one is the facts. These are your findings, the findings from your research. And why those findings matter, which is the implication of your findings. And then the desired audience response, which will be the recommendations that you craft based on your findings and implications in that model. The audience should be able to easily understand the story by reading these three parts of your main messages.

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Gorrety Parmu: And here is an example of illustrating how we could connect and gel these three components: the findings, implications, and recommendations. So, for the findings, here we see that in

Morocco, the unemployment rate among young people ages 15 to 25 is 28%, and employment providers and education institutions are not communicating about job market needs. And, also, university courses are not well tailored to prepare students to the workforce. So, what the implication is is that the educational program are not adapted to suit the needs of the job market, and that means that university— the universities will not fulfill their aim to prepare students for the real world, and also graduates may perform poorly in the job. That's if they even get employed.

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Gorrety Parmu: So, from this, the most articulate in the most accurate, oh, actionable recommendation in this case would be that the heads of leading universities, post-secondary training institutions, and major employment agencies in Morocco convene a workshop by the end of this academic year to facilitate discussion and collaborative design of new academic coursework curriculum that will align with the technical language and soft skills that young people need to succeed in the workplace.

This is just one example, gelling in what your research findings, drawing the implications— implications of those findings, and then crafting recommendations that tell your audience exactly what they need to do and how they need to do it.

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Gorrety Parmu: Similar to the first two steps, Step 3 also includes a worksheet that can help you identify and refine your main messages for each element of your story, and also ensure that your audience is able to draw a clear line from your findings to your recommendations.

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Gorrety Parmu: In Step 4 of the Communication Products section of the toolkit, you want to ensure that you're using accessible language in your communication product. Using accessible language here means using word and sentence structures that are less technical and less complicated than you might use in, for example, a peer-reviewed journal article. So, in the toolkit we emphasize the contents of accessible language. Because this ensures that your messages are clearly communicated. It ensures that they are compelling and credible to the audience that you're targeting.

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Gorrety Parmu: When you use accessible language, you build both trust and interest in your work. Also know that accessible language depends on your audience. At this point, we are assuming that you already know who your audiences are. You know what they are interested in. You know what their priorities are. You know how they like to access the information in what format, whether they read a lot of newspapers, things like that. So, you will be able to craft your language around whatever speaks most and compels your audience in a way that you would want them to act in. Some examples here: technical experts may prefer jargon for being more precise, whereas nonnative speakers accustomed to reading academic journals, they prefer more formal language.

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Gorrety Parmu: And, additionally, audiences outside of your technical field may prefer a more conversational writing style, like the ones you will find in newspapers or magazines, as those can be easy to read and often easy to remember. Another approach, too, you can use here when trying to incorporate accessibility in your product, you want to make sure that you're writing as if you are writing it for your grandmother, so that she could understand it. Again, do you have any recommendations for using accessible language in your communication products? Please feel free to tell us about that in the chat.

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Gorrety Parmu: Similar to all other steps, a tip sheet accompanies Step 4 with concrete dos and don'ts for writing accessibly. Remember, accessibility or accessible here means to a wider, non-technical audience; people outside of the research field. For example, DO use conversational words and DON'T use too many acronyms or abbreviations. Please feel free to continue putting in your experiences with using accessible language for your communication product in the chat at any time during this conversation.

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Gorrety Parmu: So now that you have completed Steps 1 - 4, you're ready to develop your communication product. This will require planning ahead and making decisions based on the time and resources available to you.

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Gorrety Parmu: So, Step 5 of this section outlines that process, including developing a timeline and budget, choosing a format, drafting an outline, and drafting the content. When creating your communication products, you can use templates provided in the toolkit to do it yourself, or you can work with a communications professional. So, step 5 will help you with a tip sheet that specifies the types of communication professionals to help— professionals to help you, as you consider who to engage in your product development process.

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Gorrety Parmu: For instance, you could choose developmental editors or copy editors or graphic designers and other communication specialists. But each of these professionals will have specialized skillsets and can contribute to your product and dissemination plan at varying levels of involvement. So, if you decide to work with a communication professional, you may outline the content or draft the product yourself. Or you may enlist a writer to draft the outline of content for you, based on existing research outputs and your work from steps 1-4.

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Gorrety Parmu: You and the communication professional will then decide together whether they can use a template, or if they should custom design the product. And again, this will be based on the resources that you have at your disposal, whether that be time or financial resources. So, this is the resources, some of the resources that I was mentioning, that is, in Step 5, that can help guide you in developing your communication product. We have the tip sheet on timeline and budget considerations and type of communication professionals that you can use.

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Gorrety Parmu: We also have a worksheet to help you create an outline for fact sheets and policy briefs. And then we also have a checklist for the product development process to help you keep track of the product development process. The toolkit also includes templates or fact sheets and policy briefs, as well as templates that you can use to create these other products. We would love to see any additional examples of high-quality communication products that you've seen and found effective. And please feel free to share these links in the chat box.

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Gorrety Parmu: So, we've just reviewed the five main steps for developing a communication product to share your research. But there is more to the process. For your product to be effective, you must also plan for dissemination and then follow up by tracking how your product was used. A dissemination strategy is basically a plan for how to share your product, whether you decide to share it on social media or through in-person meetings or on knowledge sharing platforms, or even email lists.

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Gorrety Parmu: The most effective dissemination should be intentional and developed before you share your products. It can— If we have— please, let me know if how I'm doing on time, if any. But we can take maybe a minute or two to just share some of the ways you've disseminated your communication products after they are completed. Please feel free to tell us in the chat.

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Gorrety Parmu: Oh, I like something that someone, Marion, was saying, “Keep it simple stupid,” which is keys for infographics. This is a new one. Thank you for sharing. And I see someone says, I think this is in regard to dissemination on social media: “LinkedIn seems to work well.” Yep. I couldn't agree more. Well, keep those coming as we progress in the interest of time. I see also using social media to point to website articles and videos, definitely.

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Gorrety Parmu: So, it is important to follow up after you disseminate your products to learn how your target audience used it, and whether they took any of your recommended actions. So, this toolkit includes a variety of possible metrics you can use to track how well your product is reaching your audiences and being used by the targeted audience. This is also a good time to consult the Research-to-Action Plan section of the toolkit, which has a detailed step-by-step guide on how to reach your audiences of interest, including developing a tailored dissemination strategy.

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Gorrety Parmu: You can learn more about the Research-to-Action Plan section in the next webinar, which will take place next Thursday. Gorrety Parmu: Thank you for listening and actively contributing in the chat. And I will now hand it over to Julie. Okay.

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Julie MacCartee: Thank you so much, Gorrety, and thank you to everyone who's been sharing your tips and experiences in the chat box. All right. So, as you can see, our toolkit, we've tried to construct it with everything you need to help create in an effective communication product to turn your data into a compelling story for your stakeholders or your target audience.

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Julie MacCartee: In the process that Gorrety just described, once you've identified your communication objectives and your audience, crafted your main messages and written an outline, then you need to determine whether you are going to develop your communication product yourself using a template, or whether you're going to work with or hire a design team or a specific individual designer.

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Julie MacCartee: And today we have the pleasure of hearing from Anneka Van Scoyoc, who will take us behind the scenes of the design process for creating a communication product. Anneka is the senior graphic designer at PRB, and has designed or supervised the design of dozens of RTAC products over the past four years, and she has some, I think, really cool kind of behind the scenes tips and thoughts that will help you think about whether and how to design a product yourself or work with a designer. So, Anneka, welcome. Please take it away.

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Anneka Van Scoyoc: Great! Hi everyone. Thanks so much, Julie, for that introduction. I am really excited to be here today to share more about what I, as a graphic designer, contribute to the creation of communication products and talk about how, when, and why graphic design can come into the process of creating your own communication product.

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Anneka Van Scoyoc: So, a little background on me: I've been a graphic designer in the nonprofit space for over eight years now, and I've been at PRB for four. With RTAC, I've designed or overseen the design, as Julie mentioned, of dozens of products, including fact sheets, policy briefs, and presentations, some of which you can see on the screen. But all of these started by looking like this—a nice Word doc. So today I’m going to talk a bit more about how we transform this into an engaging, attractive, easy to read communication product.

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Anneka Van Scoyoc: All right. So, as you already discussed, in Step 5 of the Communication Products Section, the toolkit includes a checklist for the product development process, including asking whether or not you're going to work with a designer or a design team. And so, if the answer is yes, which I hope it is, then the designer is usually invited to attend the kickoff meeting with other key staff. So, during this meeting a lot of what Gorrety's already covered is discussed. So, just to give you some good background on some of the questions that I really look for answers to which can really help inform the design of the product. The first is, what is your communication objective for this product? Pretty obvious up-front question. This is crucial to informing the tone of the piece, and understanding, for me, what information…what information will need to be front and center.

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Anneka Van Scoyoc: The second question I really like to get an answer to is “As a result of the communication, what will the audience know? What will they believe, and what will they do?” And this question really nicely dovetails the previous question, but it focuses more specifically on actions that will result from the communication product. Again, helping me understand more about how this needs to be designed.

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Anneka Van Scoyoc: The next question, which Gorrety has definitely already hit on is, “Who are your primary and secondary audiences?” From a design perspective, this conversation can help me get answers to more specific questions like, do you know of successful past communication products that have been shared with this audience? Is this audience less technologically savvy? Do they prefer print products? And will this audience want to easily access this information again, or share it with others? All really good answers or questions to help me better understand the design of the product, and this kind of leads to the last question: the product format. So, the question I like to ask in this kick off is, what product format would you like to use? Do you already have an idea that, like, you think that a fact sheet is definitely the right path for us to go for XYZ reason. Or if you don't have an idea, you know, this is where we can have a really large conversation, and a designer can contribute a lot to that conversation, just from my past experience, or from another designer's past experience, and kind of sum it up.

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Anneka Van Scoyoc: So, on that note, actually, this leads us to a graphic that actually is included in the Research-to-Action Plan section of the toolkit, which will be covered in next week's webinar. But it kind of nicely fits into this conversation around product format. So, as you can see in this, for, like, as an example, if your audience is policy decision makers who, you know, don't have a lot of time to read long documents, and your communication objective is to persuade them to do something based on your research, then an appropriate format might be a policy brief or an infographic or a short video, as you can kind of see if you find the audience and then go down.

On the other hand, if your audience is program managers and your communication objective is to change programs based on your research, you might create something a bit more intensive, like a scorecard or a toolkit which has, you know, a higher level of detail, technical content.

So, for RTAC, we've definitely found that fact sheets, policy briefs, and videos are often our best format options. Given our audiences and what we want them to do with the information we've shared.

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Anneka Van Scoyoc: Okay, so after we kind of have these big level discussions, I then usually, towards the end of the kickoff meeting, step in and ask some very specific design related questions, so that we have these conversations kind of early in the process. So, there's kind of three buckets of questions that I ask.

The first one is basics. What I call basics. And this includes number of pages. Do you have a general idea of number of pages page size? Are we designing on A4 paper or letter paper? Big difference since the US generally uses letter, but most of the rest of the world uses A4. Is this going to be professionally printed? Very important, especially towards the end of the design process when we’re packaging files.

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Anneka Van Scoyoc: And what languages will this be produced in? Are we creating it in multiple languages? English, often English and something else. This is also a good opportunity for us to discuss as a group whether one language will be created first, and then the other will be created from a translation. Something really important to remember with languages for design is that languages differ in length.

So, if we're creating, say, an English fact sheet and a French fact sheet of the same one, French is often longer than English. So, when I'm designing it, maybe in English I need to be taking into account the fact that when it's translated to French, we might need a little bit more space. So that's something very important to remember.

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Anneka Van Scoyoc: Alright. The next bucket is called Look and Feel. And here I ask the first question— I ask is, do you have a style guide? Does your organization already have one of these? A style guide is a document that gives background on colors, fonts, logo, usage, etc., and if you already have that and can share it with me. That's fantastic. That makes my life a lot easier, and then I'll work within that style guide. If your company or organization doesn't have one, that's fine, maybe you have a logo or a website that I can kind of put together a simple style guide of fonts and colors based off of.

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Anneka Van Scoyoc: The second question or discussion I like to have under Look and Feel is about tone. So we've obviously already answered a lot of these larger objective questions, but I really like to often here look and see if we can find some tonal words to help describe this piece. Some examples of these words could be: academic, approachable, bold, bright, confident, fun, informative, innovative, modern, or trusted. These are just some examples. But this kind of really helps inform the design of the piece and gives me good direction.

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Anneka Van Scoyoc: The final bucket is called Assets. I like asking this as early as possible in the process, so I can get my hands on whatever you have to provide to me. This includes imagery. Do you have photos that you can share with me, or do you have ideas for what photos we could use? If you want to use imagery. And also, what photos not to use if there's a something we're really trying to avoid.

Graphics. Same kind of questions. Do you have any graphics you want to share or ideas for graphics to use? And finally, logos. Will definitely need your logo, so the earlier you can share those files the better.

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Anneka Van Scoyoc: All right. So, after this kick off meeting happens, usually this is where the designer has a little bit of a down period while content is starting to come together. However, I love to be brought in before content is final, and what I am— what I'm usually doing is I'm wire framing. So, I'm taking your draft content and just blocking it out in black and white, you know, there's not like any graphics going in yet. There're not images going in.

We're just trying to see how this content fits, where it currently stands. So this helps with a lot of things. The first is it helps with word count, or do you already have too many words? Is it already crammed in too much? Or do we have space to give? You know, where we can fit more? This really just really helps with the full process, so that I'm not getting final content. That's pretty inflexible. And then finding that it doesn't fit on a piece of paper.

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Anneka Van Scoyoc: The next thing that I'm helping with, or that is really helpful, for wireframe is data visualizations. This is where we can start to identify where data visualizations will fit on the piece. And also, maybe if data visualizations can replace some existing text. You know, maybe you have a few lines of text that's mostly just describing data, maybe we can cut that out and turn it into a visualization. So that's a great piece that comes into wire framing.

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Anneka Van Scoyoc: Another component is photos. As you can see in this example wireframe, these big, you know dark gray boxes are where we could potentially fit photos. So that helps us inform us, like, what does the composition of these photos need to be, etc., etc.?

And then, finally, just with wire framing. This is where I can recommend things that you know jump out to me, maybe I noticed like, oh, hey, I think you know we could move this here, add this here, even rephrase this because we can make it a little bit more eye catching. So, wire framing is fantastic, and whenever you're able to do it, it saves a lot of— it can save a lot of hard or headache down the road. And actually, yeah, just I added the final version of this document here. So you can kind of see how similar the wireframe was from what we ended up with, and that's because we are able to avoid a lot of you know, back and forth by kind of drafting it out ahead of time.

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Anneka Van Scoyoc: All right. So once the wireframe is done, I, you know we, you guys, the research team will often then finalize the content and then give it to the designer. And this is when I do a first draft, and the first draft is definitely the most labor intensive part of the graphic design process. I'm working with a lot of different things here that I thought I could walk you through, just so, you know why it can take a little while. And why graphic designers often can't just turn something around overnight. There's a lot going on. So, the first thing that I'm working on is obviously kind of like I mentioned, a wireframing. It's text layout. It's figuring out where the text is going to fit. You know, how it's all gonna come together, especially if it's a limited amount of space. That can be really tricky. That can be down to just, you know, there's a word that's popping down to this line, and it's on its own, and we want it to be up here. So we're going to adjust the facing between the letters to get it all. You know. It can be kind of time consuming and detail oriented.

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Anneka Van Scoyoc: Something else I'm working on is custom graphics. So, this is a really nice example of like—you can kind of see how there's like a number of custom graphics here. There's kind of this graphic treatment that we included in the header that we had to identify and work into the piece. There's also these kind of infographics that are kind of data visualizations, but they're also icons that we had to hand design. Make sure they all match each other to the style is consistent, come up with the concepts for them, etc.

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Anneka Van Scoyoc: The next thing that I'm working on is photo selection and editing, so depending on if you as the research team provided me with any photos, I now have to see how the ones that I have can fit into this piece, or I'm doing my own photo research, finding photos that will work well in the piece. And then sometimes I'm working in Photoshop to edit them, because perhaps the quality isn't as good as it needs to be, or the coloring needs to match better. Another piece I'm working on in just a first draft are data visualizations. This can be anything from tables to maps, to diagrams, to bar charts. All these that, you know, I'm usually designing this from scratch at this moment, or at least, you know, adding the visual design to it.

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Anneka Van Scoyoc: And finally, the last thing I'm doing in this first draft is, I'm choosing and applying style and tone. So, depending on if you provide me with a style guide, or if I created my own style guide, I'm now trying to figure out, okay, we have this accent color. How is that going to fit in so it's drawing the appropriate amount of attention to this text or to this data visualization? So I'm working with a lot in our first draft, which is why I usually request two weeks, because I'm also working on other projects simultaneously depending on kind of the team you're working with. You might not need quite as long, but generally like a week, is pretty standard for a first draft.

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Anneka Van Scoyoc: And that leads to kind of this little timeline of what happens after that first draft is ready to be shared. Revisions happen. Rounds of review, as I'm sure, everyone on this call is pretty used to, and I put up this little kind of simplified timeline to just emphasize that. Rarely is it going to go as smoothly as the designer shows you something you say it's perfect, and then it's done. Usually you have feedback on design, or many people, as is the case usually as we're reviewing the document have feedback. Sometimes it's pretty small. And again, when you have a good process where you've wireframed, and you've avoided some of those classic pitfalls. Maybe it's just a few rounds of review where it's pretty minor things—make a change here, maybe add an icon here, etc.,

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Anneka Van Scoyoc: And sometimes you know, I've made a data visualization that just doesn't work, you know. Maybe you're looking at it. The data is wrong or like you realize that the data you want it to show isn't working, or maybe I was off the mark, you know. Again, something like wire framing can kind of help with a bit. But then you need more intensive rounds of review.

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Anneka Van Scoyoc: So, I have a few tips for revisions as the designer. These are my tips to you all when you're reviewing design products. So, the first tip is to have a designated manager of feedback. This person would look at review all the feedback from all the parties, and they would clean it up.

Which means that you would remove notes that the designer doesn't need to take action on, and you would make sure that all the feedback is action oriented, and it's very understandable for the designer. A lot of times when a team sees a design, they're gonna… they're gonna need to have conversations within themselves, because something isn't working as they thought it would, and that's great, and that's fine. Just make sure that there's always a conclusion to that conversation for the designer to have an action item.

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Anneka Van Scoyoc: The next tip is to be clear and concise. Make sure if something's not working well say why it's not working well. Give us as much feedback as we can, so that the next round that we sent, the next draft we give to you, is as close to final as possible. And the final little tip I have is to make necessary requests. My favorite phrase is, the perfect is the enemy of the good. Not like we don't want to make everything perfect, but perfect is also in the eye of the beholder. So, what we're aiming for is, we're aiming for really, really good.

Try to be as clean, as clear and concise as possible, like I said. If when you give the final draft to me to make that first design draft, make sure it's as clean as possible, so that we're not making little word changes in these final rounds of review.

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Anneka Van Scoyoc: All right. And after all these revisions, finally, we end up with a final product. Voila! So now you have this effective product that can easily be shared with your target audience, clearly states your message, and really sets you apart from the crowd. All right. So that is me walking you through kind of the process that a product usually undergoes to be to become designed by a graphic designer.

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Anneka Van Scoyoc: So now, my kind of wrap up slide, is to just give you some more recommendations from a designer. So, the first bullet or the first, my first recommendation is to—you guessed it—use a designer when you can. Obviously, your budget, your timeline might not always allow for it. But, as you can see, designers can bring a lot more than just a simple clean up job to your product. We can propose visual solutions that you might not have thought of, and we can ensure that the document is really effective. I mean, ultimately, the goal is to make your products stand apart from all the others, and eye catching design is a great way to do that.

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Anneka Van Scoyoc: My next tip is to bring the designer into the process as early as possible. Collaboration can lead to great results when designers work with authors to suggest visual solutions and ensure the content fits into the product and an effective way.

My third tip is to share information with us that we might not know. You know, share things like background on target audiences, symbology or graphics to use or avoid and why, an imagery to use or avoid and why. This is a learning experience for everyone involved, and I'm often not an expert in the target audience. So, I love learning from you, and that can really lead to super effective design.

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Anneka Van Scoyoc: And my last bullet is don't feel like you have to know what you want coming into this. But if you do tell us why. Again, learning experience, we want to hear from you. We're not here to tell you what you should do, but it can be, really, a great experience for us to have full discussions and flesh out what the design of the product should be, what the product should be. So all right. Well, that's my little section. I'm excited to see if you guys have any questions for me at the end of the presentation. Thanks so much.

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Julie MacCartee: Thank you, Anneka. I really enjoy hearing kind of the nitty-gritty behind the scenes of what a designer does, because it's easy to think it's a simple and quick process, but the expertise that goes into it. I think that, you know, designers and communications professionals have their own realm of expertise that matches nicely with the scientific and technical expertise that researchers often have, and it's using those in a balance to create main messages and good communications products.

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Julie MacCartee: Just a few additional tips that I wanted to share, learned from developing communications products for USAID researchers that I wanted to share before we get into our Q&A.

First up, a really important point that I learned over the years is that people don't tend to read anything from start to finish. They skim. Especially that first pass right when you're first looking at something, you never start at the beginning and read all the way to the end. You look for the headings. You look for the bullet points.

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Julie MacCartee: There have been eye tracking studies that have demonstrated this. When websites or communications products are put in front of people, people tend to skim around. And so, it's really important to ensure that main messages stand out, that they are bold text, in bulleted format, and often to put the bottom line up front or the BLUT. Make sure that if people only read one single sentence of your communications product, that they're walking away with something useful, even if later on they might hopefully read the whole thing in full.

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Julie MacCartee: Next, remember to share your products where your audience is already consuming information, to do a little bit of research on your audiences and see what newsletters they're looking at, what websites or blogs, and be sure to put your products where your audience might already be looking, since they— often audiences won't naturally come to your own website, or may or may not see on social media. It's good to do that extra step of research.

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Julie MacCartee: Thirdly, ensure your audience knows how to follow up or whom to contact. It's just a small point, but make sure that your communication product contains either links to more information, links to your website and email address any way, so that those who really are interested know what their next steps are, and who to contact it. Not all communications products kind of contain that additional piece of information.

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Julie MacCartee: And lastly, touching again on the translation into different languages. Anneka brought up a great point that different languages are different lengths, and so may not fit in the same amount of allotted space. In addition, we run into some, some challenges of opportunities regarding different dialects. Translating something into Bengali is not necessarily one-to-one simplicity. There are different dialects in different parts of a country.

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Julie MacCartee: There is language that is typically used in the media, but that might not always be matched up perfectly with colloquial language that is used in a community. And so just allowing a little bit of extra time from the perspective of a communications professional, recognizing that it may not be as simple as you expect to translate into certain languages, and you may have to consider multiple translations to reach multiple audiences even within the same language.

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Julie MacCartee: All right. So, we have some time now to dig into your questions before we wrap up. And so I'm going to take a look at the questions. I know we've been answering some along the way in the Q&A box.

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Julie MacCartee: One that I wanted to highlight, because I think it is such

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Julie MacCartee: a great and important question is from Benjamin. And, Benjamin, I think you're asking this from the perspective of a communications professional: "scientists and researchers seem to think we are dumbing down their work and research in order to get audiences to pay attention, have an interest, and actually read or view the story, article or communication piece. Do you have any advice about this?"

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Julie MacCartee: This is a really great question, and that is actually something that I've experienced when working in communications. There was even one specific time a few years ago, where a technical expert staff member wrote a blog post, and I and my other communications teammate, you know, we transformed what he had written into what we thought was a, frankly, like a, a better, easier to read blog post. And when we put it back in front of him, he was understandably kind of upset that we had. He thought it was no longer in his voice. Right? That we had completely changed it into something that was no longer something that he had offered, and that really struck me, realizing that, that voice can be very important.

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Julie MacCartee: And I, and just collaborating along the way, you know, just completely changing something all at once, can feel very jarring. And, like you're not respecting the ownership and expertise that a researcher or technical expert might have. Maybe not respecting the audiences that they have in mind. And so, I think, obviously as communication professionals, so much of it is about communication, right? Maybe iterating a bit as opposed to wholesale changing what you've received, and making sure that you're just working together along the way. And also finding that balance between technical information and easy to understand lay information.

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Julie MacCartee: Sometimes it's just about length, right? The shorter something is, I think the more technical it can be. You can…yeah, a few sentences of really dense technical information can be understood. Or maybe there is an FAQ or a glossary to help people understand. If you want to go the more technical scientific route as opposed to the more kind of shiny lay audience route. Obviously, there's a lot of opportunities there, and probably some others have more suggestions. But always about finding balance right.

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Anneka Van Scoyoc: Julie, I'm happy to answer these three questions in the Q&A box.

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Julie MacCartee: Yup. Yes. Great.

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Anneka Van Scoyoc: Okay. Thank you, guys, for these questions. I'll do my best to answer them right now. The first one is from Norma, and it's about how to improve data visualization. Great question! I think, and that's something I do want to point out, not all graphic designers are necessarily going to be like data visualization experts. But I definitely think that almost any graphic designer is going to come in with a pretty good background on, if nothing else, cleaning up data visualizations.

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Anneka Van Scoyoc: This process is really different for every product I've ever worked on. Sometimes people come to me, and with proposed, you know, bar charts or pie charts, and that's great, and I love it. I often like to look at the data to kind of ensure that I think that that is the best format for the data viz. And if so, then you know, that's when it just comes down to styling it correctly. And there's obviously a lot of good data or design tips that go into styling data visualization so you're correctly drawing people's eyes to the data that you want to be showing.

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Anneka Van Scoyoc: Other times, you know, it's really open, ended, and it's just like “Here's a sentence with some data in it.” What do you think me as the designer, what do I think we should do with this? You know, a lot of times we'll just do kind of like big poppy data points. We’ll be like “13” and then we have the description. Sometimes we'll add an icon to that to make it a little bit more visual.

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Anneka Van Scoyoc: Yeah, it's kind of always a different process. Like I said, back and forth. I always, I think it's great for me to talk directly with the researchers, since it's their data. And yeah, you guys know it a lot better than I do. And sometimes I need a lot of, sometimes it needs a lot of unpacking and explaining which can be a great process for both of us, because I'm kind of that lay audience that may not understand it as easily, so we can unpack it together.

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Anneka Van Scoyoc: So, I hope that answers the question. Second question is: “Some teams have a lack of budget and can't have an in-house graphic designer or a vendor. What would I recommend? Canva or another online tool?”

Great question. It's always unfortunate if you can't use the designer, even if you know you can find one for, like, a couple of hours to kind of do that clean up job I mentioned. Although we can do a lot more than that, that can kind of helps ensure small things that might get overlooked by a non-designer, get cleaned up like alignment, spacing, font size, etc. However, you did mention the tool I would probably recommend, maybe, for depending on the product. I love Canva. If you haven't heard of Canva, you can go to canva.com, and check it out. It's a free online tool where you can create just all these different types of products. It was created specifically for social media graphics, and it's branched out a lot since then, so that you can create larger products like fact sheets or reports in it, and they have templates, which is really cool, because you can just kind of find a template, and then add, you know, your fonts and colors.

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Anneka Van Scoyoc: However, I don't also think Canva is amazing for lots of text. It can be, I think, a bit more cumbersome and maybe challenging to work in. I'd also be a little bit concerned that, like some things could go awry in it. I haven't ever used Canva to build something like a fact sheet before, so I can't really speak from experience there.

So I'd say check it out. I mean, obviously, you can work in Microsoft Word and add some basic styling there. Microsoft Word, it does have templates that you can find if you poke around a little bit, which you could use and work from there. Word just can be pretty finicky to work in, especially with like columns and stuff. So, it's not ideal if you're not a pro, but it's an option. I can't… I use... as a designer, I use Adobe products. So, it's called the Adobe Creative Cloud, and that's InDesign, Illustrator, Photoshop, etc. That's what most graphic designers will use. So yeah, I hope that answers that question.

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Anneka Van Scoyoc: And again, just to reiterate, it doesn't always have to be, you know, over the top. It can be very simple by just applying some nice heading styles, and maybe like a footer. You know, a line here, a line there. It makes…it can elevate a word document from basic to something a bit, a bit nicer if you don't have the budget for designer. Okay?

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Anneka Van Scoyoc: And the last question is from François, and it is, "would you recommend a specific Twitter visual card to promote the policy paper link?"

Great question. I, again, actually use Canva for a lot of my social media graphic design. So that's accessible to anyone, and I would encourage you to use. I would say, since it's a yes or no question—yes, it's a great idea to come up with a visual, a graphic that can complement your paper. Now, a little bit of this could depend on how the paper is uploaded to your website.

As most of you probably know, if you go to Twitter or LinkedIn and paste in a hyperlink, it'll automatically pull the image that's associate that you've uploaded on the back end of your website like. If you had a header image, or maybe there's a specific space to upload a social image, that is probably what's going to be automatically pulled and put into that image in the, in the Twitter Post, and that can work. You know, if it's, if you're using the header image from the fact sheet and then putting it into the back end of your website, and that's what's getting pulled. Maybe you don't need an extra graphic. Maybe that's, you know, visual enough.

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Anneka Van Scoyoc: However, especially, things like fact sheets where we're making maybe some data visualization. Those can lead to really nice little Instagramable or Tweetable graphics that you can kind of pull out put into Canva. Or maybe even just screenshot. If you don't have a graphic designer assisting you, and then that can be an additional, you know, Twitter Post, or that can be something that is not just an image. But it's actually really informing people as to like what this policy paper is speaking to. So, I know that was kind of a long winded answer to a yes or no question, but I hope it gave some good background on, on, you know, making graphics for social to accompany your communication product.

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Julie MacCartee: Thanks so much, Anneka, and thanks Susan, for posting a link to some great easy tips for data visualization.

Please do share your links, all of our participants. If you have either a communications product that you think is fantastic that you'd like to share, or, again, other tips and tools. We are happy to know what you've used, or what you think is worthwhile. And I think you know it's no amount of data visualization or crafting a product can make up for, you know, for not having the… that ultimately, if you have to put your effort in one place, I would say, you really want to focus on those bones, right? The main messages, those core messages and recommendations that you want to share. They can shine in a very simple format if they are what your audience needs.

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Julie MacCartee: So, kind of echoing what Anneka said, there's… there's such a range of what you can do with the communications product, and whatever you can do within your budget or within your timeframe can be worthwhile.

Anneka, you just pasted a long link. What is this one to?

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Anneka Van Scoyoc: Yeah, Sorry. I just went into my saved folder to see if I had any additional tips. This is a really great post about designing accessible charts for visually impaired readers. But, to be honest, like, this is about designing accessible charts, but it's also got a really lot of just great basic like data visualization tips in it. This is also kind of focused on online charts. But again, a lot of this applies to a static chart. If you're adding it to a print product as well. So just another one that you could, that you can file away if you ever need it.

01:10:11.890 --> 01:10:41.310

Julie MacCartee: Great, thank you.

Do we have any other questions for a panelists or questions about how to use the communications product section of the research translation toolkit. And if any of our panelists have seen something in the Q&A box that you want to elaborate on, please do feel free to jump in.

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Julie MacCartee: Let's see. I see Natalia is asking about any tool for optimizing video editing. Making that simple. Does anyone have a suggestion? Video editing is certainly, it's not my area of expertise. We can actually…

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Marlene Lee: Hi! How are you? We can ask our specialist, and put our response in the follow up materials.

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Julie MacCartee: That sounds great, providing kind of a short list of some recommended tools in our post-event email.

And I see Carmen has recommended a few apps: InShot, Cap Cut. I think the video editing tools are getting ever more user-friendly and stepped. So, it'll be exciting to see kind of what apps come forward. And Benjamin recommends Adobe Premiere for video editing. Great. But expensive. Yes, that's always, that's definitely always a challenge—weighing cost and time versus what you want to achieve.

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Julie MacCartee: All right. Well, please feel free to continue to paste questions in the Q&A box.

But in the meantime, we'd love to take a moment now that we reviewed the Communication Products Section of the toolkit, we'd love to know how you plan to incorporate the information from this piece of the toolkit, or from our discussion today into your work at your institution. So, as before, we're going to put a link into the chat that you can use to add your answer. And you can also add a thumbs up to other participants' answers that you like or agree with. And we'll read out a few of the answers that come through. It's always great to see just what people are thinking. What are your next steps? You'll see Jill has pasted in the chat a link. How do you plan to incorporate the information from the Communication Products section in your work or at your institution?

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Julie MacCartee: We have one line saying, "start product design process earlier." Great. That's such an important one. To think about it sooner, and give yourself lots of time to think through audiences, potentially. What can the designer, and that… another vote for involving a designer early.

It's a great option. I really enjoy working with designers over the years. And they sometimes just spark ideas for new audiences, new types of products.

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Julie MacCartee: Another, another "engage designers early on." Wonderful. I see someone wrote: "help researchers clarify upfront who they think can use their evidence." Great! That sounds like it was written, perhaps by a communications professional who can help, maybe, ask the right questions to walk through some ideas of what the main messages are for different audiences. I love... Someone wrote, “Ask my grandma or kid to read it.” Yes.

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Julie MacCartee: Honestly, it's a great idea. I have a 7 year old, and it's funny, I get so used to using certain types of jargon at work, and when she asks me to explain something to her, I really have to stop and think and explain it in a new way. It's a good challenge. So actually, I love that idea. We're just testing it with a variety of different audiences. Audiences that may be interested in your work.

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Julie MacCartee: And one person wrote: “share some of this information with technical teams so everyone is aware of the communications needs to deliver great products.” That sounds great, just awareness of what can go into the process.

I see, “Figure out where policymakers get their information to begin with.” Yep, doing a bit of that research. What newsletters or channels or trusted advisors are getting them the information that they actually use, right? Because information overload is such a huge problem in our modern society. We can only read so much and internalize so much. Putting yourself in the shoes of your intended audience. It's a great option.

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Julie MacCartee: I'll read a couple of more responses.

Similarly, “asking audiences about which format is most accessible for them.” Right? Not making assumptions, but simply asking your audiences about what their needs are.

“Training more folks on how to use Canva.”

“Help researchers clarify who, what, why questions about their work and research.”

Yeah, just being intentional.

Great. Thank you all for sharing these thoughts and commitments.

01:16:43.180 --> 01:17:19.240

Julie MacCartee: Okay. On that note, moving forward, we would love to hear your stories about using the communication products section or other sections of the Research Translation Toolkit in your work. Your stories help offer valuable lessons and guidance for others who are working to get their research disseminated and used. So, if you have examples of communications products that you've created, we'd love you to email us at itr.researchfeedback@usaid.gov.

01:17:19.640 --> 01:17:46.420

Julie MacCartee: And we may follow up with you to ask your permission to share your story in a USAID blog post or in USAID social media. You're also welcome to reach out to this email address any time if you just have questions about the toolkit, suggestions about how we can improve webinars and communications around the toolkit. I am… a few of my other colleagues read this email account, so we're happy for you to reach out.

01:17:49.620 --> 01:18:17.490

Julie MacCartee: Lastly, we invite you to join us for our final webinar in this series, which will focus on the Research-to-Action Section of the toolkit and will take place next Thursday, March 9 at the same time. You can register for this webinar on the event website, and a link will be added to the chat. And again, just to mention, we will send you a post-event email with the link to these slides, a recording and other post-event resources.

01:18:20.180 --> 01:19:13.550

Julie MacCartee: On that note, on behalf of USAID and our RTAC activity, thank you to all of our presenters and to all of you for taking the time to join us today, and we hope to see many of you next week. Thank you very much, and we hope you enjoy the rest of your day.

Thanks, Mary and Benjamin and Kendra really appreciate it, and thanks for participating.

Thank you, Carmen.

Thanks, Matilda and have a great rest of your day.