

# Communications

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## Summary

The Research on Open Educational Resources for Development (ROER4D) project was a four-year (2013–2017), large-scale networked project which set out to contribute a Global South research perspective on how open educational resources can help to improve access, enhance quality and reduce the cost of education in the Global South. The project engaged a total of 103 researchers in 18 sub-projects across 21 countries from South America, Sub-Saharan Africa and Asia, coordinated by central Network Hub teams based at the University of Cape Town and Wawasan Open University.

This chapter forms part of a project activity toolkit, which is comprised of five documents outlining activities associated with each of the ROER4D UCT Network Hub pillars of project management activity: networking, evaluation, communications, research capacity development, and curation and dissemination. It is hoped that these chapters will be of practical use to other research projects attempting to integrate any of these functions in their operational strategy.

The chapter charts the experience of the ROER4D Communications Advisor in developing a research communication strategy for the project. It provides a short overview of the research communication field in order to give context and background to some of the field's key debates and considerations, with attention given to the specific field of development research communication. Following this, it describes the evolution of the ROER4D research communication strategy.

## Acronyms and abbreviations

DECI-2	Developing Capacity in Evaluation and Communication Capacity in Information Society
IDRC	International Development Research Centre
MOOC	Massive Open Online Course
OEP	open educational practices
OER	open educational resources
PI	Principal Investigator
ROER4D	Research on Open Educational Resources for Development
UCT	University of Cape Town

## Introduction

Funders of research are increasingly concerned with the communication, uptake and impact of research. While many factors influence whether research is used or whether findings influence policy, research communication is a crucial factor.<sup>1</sup> This impetus places pressure on researchers and research teams to formulate objectives, develop communications strategies and plan research communication activities to ensure that findings are communicated effectively and timeously to targeted stakeholders and to those for whom the research is deemed useful (Barnard, 2010).

While research communication is important for all research projects, it has particular resonance and poignancy for research projects focussed on openness, open education, open educational practices (OEP) and open educational resources (OER) within a development context. The “open” movement is sometimes challenged as being insular and inward-looking (Weller, 2014), with awareness of OER among potential users growing slowly (Allen & Seaman, 2012). How to communicate about open education and OER adoption and impact to a wide range of stakeholders and to diverse groups (especially to those who might not be familiar with the terminology) remains a challenge for open practitioners and researchers.

Named as a specific objective to support the overall Research on Open Educational Resources for Development (ROER4D) project aims, the communications function was overseen by a Communications Advisor who supported the Principal Investigator (PI) and other members of the University of Cape Town (UCT) Network Hub in conceptualising and delivering on the project’s communications strategy. The scope of the communications function was restricted to supporting the activities of the UCT Network Hub and not individual sub-projects. Part of the funding requirement was participation in a mentoring and capacity development programme provided by an International Development Research Centre (IDRC)-funded programme – the Developing Capacity in Evaluation and Communication Capacity in Information Society (DECI-2)<sup>2</sup> project based in Ottawa, Canada. The ROER4D Communications Advisor also worked closely with the other UCT Network Hub portfolio teams, particularly as relates to the evaluation, networking and curation and dissemination activities.

This chapter charts the experience of the ROER4D Communications Advisor in developing a research communication strategy for the project. It provides a short overview of the research communication field in order to give context and background to some of the field’s key debates and considerations, with some attention given to the specific field of development research communication. Following this, it describes the evolution of the ROER4D research communication strategy. The trajectory of developing and implementing a communications strategy in the ROER4D project took place in three phases: (1) strategy and activity formulation, (2) implementation, (3) and iterating and responding to audience needs. It is hoped that this account will provide some insights into the development of a research communication function and be of interest to other researchers, PIs and research teams.

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1 <https://onthinktanks.org/articles/how-can-we-make-research-communications-stickier-reflections-from-the-institute-of-development-studies/>

2 <https://www.betterevaluation.org/en/taxonomy/term/1520>

## The changing research communication landscape

It is useful to consider debates in the field of research communication so as to situate the work of ROER4D's communications function and to understand some of the broader issues that have influenced the development of the project's communications strategy. Funders are increasingly concerned with the dissemination and uptake of research, and are, as such, increasingly focussed on the methods and efficacy of communications through which research projects communicate processes and findings effectively and timeously. While many factors influence whether research is used or whether findings influence policy, research communication is acknowledged as a crucial factor.<sup>3,4</sup> This is particularly the case with projects that have a development focus – that is, research initiatives with the strategic objective of communicating evidence aimed at achieving social, economic and human capability goals centred around alleviating poverty and enabling access to education and healthcare.

As many of these projects are situated in the Global South, additional sensitivities exist around how the creation of knowledge (by Global North funders and researchers) which is then communicated to the Global South reinforces structural inequalities and deepens the historical polarities of centre and periphery. Lewin and Patterson (2012) provide a useful historical overview of the competing discourses within the field of development research communication, describing how linear, top-down communication approaches seek to change behaviour and exert an influence through the provision of findings from expert to recipient. Alternative perspectives focus on participatory communication strategies that involve practices promoting inclusive dialogues involving researchers and citizens “sharing knowledge, experiences, and desires in order to pursue agendas of their own choosing” (Lewin & Patterson, 2012, p.41). This approach is allied to development discourse that privileges listening rather than telling, and respecting local knowledge and agendas (Quarry & Ramirez, 2009).

Interest in the field and the growing body of work by practitioners has generated practical guidelines and a research communication “industry” aimed at assisting researchers and communicators in developing effective communications and impact strategies. A review of these guidelines reflects a shift in emphasis towards more participatory communication approaches. One particular example is how the traditionally used term “dissemination” has come to mean more than a one-way linear approach to communications, and now incorporates “consultations” or “dialogues” (Benequista & Wheeler, 2012). “Value-added research dissemination”, whereby “passive diffusion”, or simply placing new information where it can be found – even if targeted to a specific audience – is increasingly seen as being insufficient to encourage its spread (Macoubrie & Harrison, 2013). Increasingly guidelines promote an approach in which the focus of research communication is on uptake or utilisation (DFID, 2013) or impact (Reed, 2016).

The timing and frequency of research communication is influenced by the project perspective on the nature of research communication where “the emphasis of participatory communication is often on the process of creation or engagement, rather than products” (Lewin & Patterson, 2013, p.41), and the principle that research projects need to be communicating at planning stages around methodologies as well as later for findings (Macoubrie & Harrison, 2013; Neta et al., 2015).

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3 <https://onthinktanks.org/articles/how-can-we-make-research-communications-stickier-reflections-from-the-institute-of-development-studies/>

4 <http://www.researchtoaction.org/2013/07/the-impact-of-research-on-development-policy-and-practice/>

Researchers now play varied roles in the research communication process; many researchers actively work with individuals who are directly impacted by research findings (Lewin & Patterson, 2012), while others play a “value-added role in moving information ... [and engaging in] activities that add value by addressing expectations and concerns of audiences” (Macoubrie & Harrison, 2013, p.5). The emergence of intermediaries and knowledge brokers has added to the complexity of the research communication landscape, with researchers now engaging with a range of individuals and organisations who re-translate research and knowledge to specific interest groups<sup>5</sup> (Datta, 2012; Harvey, Lewin & Fisher, 2012). The terminology involved in the practice of achieving research impact through communication is similarly rich and complex. Reed (2016, p.x) contends that “[i]mpacts occur through processes of knowledge exchange” and reflects on the many different ways of describing this process, including “knowledge management, sharing, co-production, transfer, brokerage, transformation, mobilisation, and translation”.

Despite this growing focus from funders and pressure on researchers and research projects to consider research communication and impact as integral aspects of the research process, for many researchers the idea of embarking on communications and impact activities is a daunting one. Defining and determining impact is particularly challenging – a factor that is compounded by the fact that different funders and bodies worldwide define impact in differing ways. Reed (2016) outlines a number of ways in which impact can be considered, including: instrumental impacts, which focus on changes to policy and practice; conceptual impacts, which relate to achieving broader understanding and awareness-raising of issues; and capacity-building impacts.

Global developments in technologies and communication channels heralded by the advent of social media and Web 2.0 technologies have changed the way people are finding and consuming information, which has led to a convergence in ways of working in development research communication (Lewin & Patterson, 2012). Increasing ease and access to information via internet and mobile connectivity is changing the way research is found and consumed; it has also influenced our conception of what constitutes knowledge (Harvey et al., 2012). A study on policy-makers in the UK civil service found that social media and web presence was increasing in importance (Talbot & Talbot, 2014); while a study in Ghana, Nepal, India and Ethiopia found that policy-makers were spending more time looking for information rather than reading pre-sourced briefs (Batchelor, 2012).

New emerging patterns of behaviour – including low barriers to creating content and web-enabled publishing channels – mean that many convenient, creative and visual methods have been introduced to facilitate stakeholder engagement in research and communication (Lewin & Patterson, 2012). Examples include uploading presentations to SlideShare, blogging about research as it happens, using Twitter and Facebook to build communities around research interests and using infographics to communicate research findings (Reed, 2016). This is not to say that participatory media and methods are necessarily benign. Digital divides abound in the Global South (Harvey et al., 2012) and hegemonic hierarchies tend to re-establish themselves. For example, a notable and increasingly researched phenomenon is the profile of Wikipedia editors, which are predominantly male and from the Global North.<sup>6</sup>

5 <https://onthinktanks.org/articles/how-can-we-make-research-communications-stickier-reflections-from-the-institute-of-development-studies/>

6 <https://www.wired.com/2015/03/wikipedia-sexism/>

A complex picture thus emerges regarding approaches, new technologies and research communication practices which are influenced by and in turn influence the development practices. The next section focusses on the research communication function of the ROER4D project in order to share and reflect on the process and thinking behind the development of the project's communications strategy and its implementation. In the early stages of project development, this process was heavily informed by the funder-stipulated mentoring provided by the DECI-2 project.

## Designing and implementing the ROER4D communications strategy

Common to many guidelines for developing a research communication strategy is the advice to proceed through distinct activities that broadly involve design, implementation and evaluation. Development of the ROER4D communications strategy development involved three main phases:

Phase 1: Designing a communications strategy

Phase 2: Implementing the communications plan

Phase 3: Iterating and responding to audience needs

### Phase 1: Designing a communications strategy

The DECI-2 project offered a structured approach to developing a research communications strategy, which involved working through a series of specific steps. These steps provided useful scaffolding and introduced the Communications Advisor and the UCT Network Hub to a set of tools and a selection of key terms and concepts.

#### Readiness

The starting point in developing a research communications strategy was ascertaining both organisational and team "readiness" to embark on developing a research communication function. The literature suggests that limited resources and skill-sets on the part of research teams and communications staff to participate in effective, innovative and participatory methods of research communication is a common constraint (Barnard, 2010). Ascertaining readiness in the ROER4D context involved considering a range of factors, including: organisational-level factors, such as staff availability, time, resources and support from senior management, as well as attitudes towards exploring communications through this process. The DECI-2 mentors consulted with the PI and Project Manager prior to the appointment of a Communications Advisor for the team, and after her appointment facilitated further consultations and sharing of documentation with the team setting out expectations and signalling the importance of the communications function within the broader team.

It should be noted that decisions about readiness are open to interpretation. In the case of the ROER4D project, which had multiple sub-projects and multiple contexts (not all of which were known at the inception of the programme), it was not possible to determine whether the initiative as a whole was "ready" at the outset. Notwithstanding some crucial readiness factors (such as skilled staff, budget and managerial support, which were in place), the UCT Network Hub did not know with certainty whether it had sufficient, appropriate staff with the right skills, as it was not clear what the specific outcomes were or how the strategy would

evolve. In large-scale, complex projects operating with an agile approach, communicators need to be naturally curious and be willing to take a dynamic approach.

**Reflection point** Ascertaining readiness through a structured process helps to manage both risk (to the project) and expectations (of the project team).

The development of the communications strategy was kick-started through preliminary analysis work. This included situational analysis through consideration of the context, stakeholder analysis through audience identification, and articulation of communication purposes through team and stakeholder consultations. Specific activities covered in these steps are explicated below, but it should be noted that this was an iterative rather than a linear or straightforward process.

### **Situational and stakeholder analysis**

Some communications activity had already taken place in the ROER4D project before the formal process of developing the communications strategy was instigated. This was due to the fact that the communications function was discussed at the first inception meeting of the entire researcher network, which took place before the formal communications workshops led by DECI-2. Prior to the appointment of the Communications Advisor, a rudimentary website was developed with the project name, logo, key personnel and project objectives. Email was being used to communicate with participating researchers, but no further communication channels were in place as yet.

The first formal stage of situational analysis commenced with the appointment of the Communications Advisor and the first facilitated workshop.

The situational analysis prompted a number of questions, including:

- What did we already have in terms of communications assets?
- What objectives or strategies were already in place?
- What was known about the stakeholders?
- What were the immediate needs of the Network Hub and project researchers?
- What were the expectations of the funders, advisory group and the PI with regards to communications?

These questions were raised in the first project workshop and the real value lay in the posing of these questions rather than articulation of answers, as the process provided the Network Hub and funders with an opportunity to collaboratively consider the issues at hand. Along with situational analysis, the Communications Advisor and workshop participants mapped out initial stakeholders. Again, what was key was not so much the mapping exercise but the participatory nature of the process. Involvement of the Network Hub, representatives from the advisory group, funder representatives as well as the DECI-2 facilitators who ran the workshop enabled a comprehensive approach to the articulation of a research communication strategy which had the buy-in of key stakeholders.

**Reflection point** Involving the wider project team, funder and advisory group representatives to participate in situational and stakeholder analysis at the start of communications strategy development process helps to establish a common vocabulary and situates the communications function at the heart of the project.

### **Articulation purpose of the communications strategy**

A seminal process in the development of the ROER4D strategy was development, refinement and agreement upon the key purposes of the project's communication strategy. The scaffolded workshopping process, designed to iteratively develop the communications function, facilitated the emergence of four key purposes which guided the communications activities. These related to:

- Visibility – establishing the project's presence in the OER research community.
- Networking – outward-facing activities to build relationships with OER/open education researchers, practitioners and organisations.
- Research capacity development – inward-facing communication activities to support the research capacity development of ROER4D researchers.
- Knowledge generation – communicating project findings to inform policy and practice.

While the purposes may seem quite high-level, this is their precise value. They remained memorable and distinct, and provided a shorthand that helped to direct communications activity. They also signalled a phased approach to communications activity.

Once the primary purposes of the communications strategy were developed and agreed upon by project stakeholders, the Communications Advisor (with the support of the DECI-2 team) embarked on a process of analysing and further expanding upon two key areas that would inform the strategy: audience and stakeholder analysis and development of communications objectives. Both these activities happened broadly in parallel with the articulation of the research communications strategy and strongly informed the project communications strategy.

### **Audience and stakeholder analysis**

The first communications workshop established broad audience and stakeholder groupings. This was achieved through asking for suggestions from the workshop participants and the grouping together of possible stakeholders. Tentative judgments were made about which stakeholders would be most interested in the research and which stakeholders would be served by the various purposes. Groupings included:

- External: OER researchers, OER practitioners, higher education institutions, education policy-makers, educational publishers.
- Internal: ROER4D researchers, funders, most institutions.

As well as broad groupings, specific organisational and individual stakeholders were identified. This included organisations such as Creative Commons, the United Nations Educational, Scientific and Cultural Organization and Commonwealth of Learning, as well as OER proponents such as David Wiley and Cable Green.

The organisations and groups were categorised by type and then tagged in two ways: whether there was a high or low probability of them influencing the research and whether there was a high or low probability of them being influenced or impacted by the research. At this stage these judgements were based on the preliminary understanding of the OER landscape held by the Network Hub, funder representatives and the advisory group; it did nonetheless provide a valuable starting point and direction for the Communications Advisor to develop specific objectives.

**Reflection point**

Early audience and stakeholder mapping, even if it is tentative, brings the audience into focus. While groups are useful, named individuals who can influence or be impacted by the research can be powerful motivators in understanding audience contexts as well as the possible needs and interests of stakeholder groups.

**Communications objectives**

The culmination of the design phase of the communications strategy is to develop specific objectives to inform communications activities. This brings together the situational analysis, purposes, audiences and stakeholders, as well as initial understandings of media preferences in a form that enables the design of specific communications activities.

As communication objectives should be measurable statements that guide the design and implementation of the communications strategy, one approach to developing such objectives is to ensure they are “SMART”, which according to the well-known mnemonic stands for:

- Specific – targeting a specific area for improvement.
- Measurable – the ability to quantify or at least suggest an indicator of progress.
- Agreed upon – specific about who will do it.
- Realistic – stating what results can realistically be achieved, given available resources.
- Time-related – specific about when the result(s) can be achieved.

Eight specific objectives were articulated and underpinned the ROER4D communications strategy. Developing objectives was one of the most challenging aspects of designing the communications strategy, as it required writing SMART objectives in a way that included the following elements: “What would be done?”, “How?”, “For whom?” and “By what means will it be measured?”. This process took a number of weeks, with the Communications Advisor being supported in the process by a DECI-2 mentor to refine the phrasing. A series of revisions were needed following feedback from the Network Hub. The question of how to measure whether an objective had been achieved or not was particularly challenging. Table 1 maps the objectives developed to the projects’ four main articulated purposes.

**Reflection point**

Developing objectives is challenging due to the requirement that they be specific and measurable in order to be meaningful but also broad enough to allow for flexibility and change as events and activities continue to inform the landscape.



**Table 1: Communication purposes mapped to associated specific objectives (with associated stakeholders indicated in bold text)**

Project purpose	Associated objectives
Visibility	<ol style="list-style-type: none"> <li data-bbox="427 314 1153 455">1. To establish ROER4D as a significant OER research project using the website, social media (mainly Twitter and Facebook), SlideShare and external press among <b>global OER networks, organisations and programmes</b> to the extent that the project receives invitations for dialogue and participation from external OER network members.</li> <li data-bbox="427 465 1153 633">2. To establish credibility and receptivity (as research develops and findings can be communicated) through physical and online participation at key conferences in 2014–2016 (and hopefully in 2017) with <b>OER researchers and policy-makers</b> to the extent that positive feedback is received and the project receives invitations for further dialogue and participation at other events.</li> <li data-bbox="427 643 1153 780">3. To engage those in the educational field, including <b>publishers, Massive Open Online Course (MOOC) providers and related research projects globally</b> through the newsletter, website, social media, and face-to-face events, in order to expand the reach of the project beyond the immediate partner networks.</li> </ol>
Knowledge generation	<ol style="list-style-type: none"> <li data-bbox="427 801 1153 942">4. To share our research process openly with <b>both internal researchers in the ROER4D network and external OER researchers</b>, to contribute to the field of ‘open research’, using the project website, SlideShare, publications, social media and webinars to the extent that other networks acknowledge and draw on the practices.</li> <li data-bbox="427 952 1153 1197">5. To share and communicate research findings that relate to use, adoption and impact of OER in Global South with <b>both internal researchers in ROER4D network and external OER researchers</b>, using the project website, OpenUCT/open repositories, SlideShare, publications, social media, webinars, blog posts and external press to discuss findings to the extent that ROER4D becomes a “reference point” in the OER field (increase number of papers and SlideShare downloads, increase in citations, increase in conference engagements and Twitter traffic).</li> </ol>
Networking (internal)	<ol style="list-style-type: none"> <li data-bbox="427 1219 1153 1379">6. To build links <b>among researchers within the ROER4D network</b> by sharing information via email announcements, the project website, newsletter and social media (especially when organising face-to-face events and online interactions) to the extent that researchers report feeling part of the ROER4D network (in end-of-event evaluation forms and social network analysis).</li> </ol>
Research capacity development	<ol style="list-style-type: none"> <li data-bbox="427 1400 1153 1568">7. To share resources with <b>ROER4D researchers</b> using email announcements, the project website, newsletter and OpenUCT repository to the extent that the website, newsletter and OpenUCT repository downloads show increased and sustained reach; requests for more information are received; and researchers share relevant new resources email and web links.</li> <li data-bbox="427 1578 1153 1738">8. To support and build research skills of <b>researchers in ROER4D network</b> using live webinars, recorded webinars, presentations available via the project website and workshop sessions to the extent that self-reporting of capacity building via surveys and interviews confirms the extent of skills gained and articles published in peer-reviewed journals.</li> </ol>

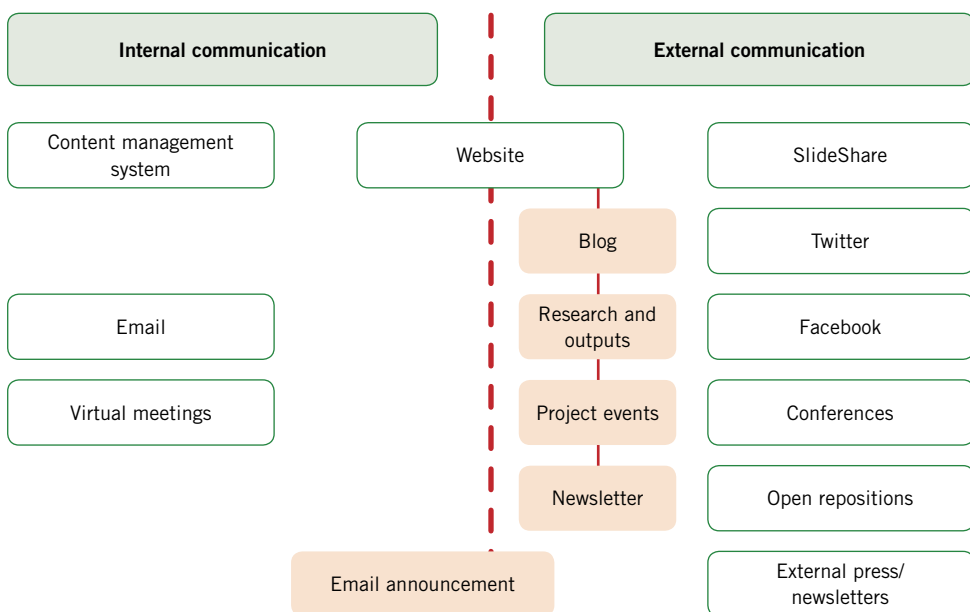
## Phase 2: Designing and implementing the communications plan

The ROER4D communications plan was developed iteratively, guided by the communications objectives. The Communications Advisor designed activities to support the objectives, aligning these with the research project schedule and available resources.

### Selecting media and channels

The initial phase of the project was dominated by activities that privileged the objectives related to visibility, networking and research capacity development. In order to develop a network of interested parties across geographical and disciplinary contexts, the Communications Advisor implemented activities that informed and engaged stakeholders about the project aims, focus areas and research methods. The knowledge generation purpose which aimed to share project findings could only be implemented once initial findings were releasable, but activities related to visibility and networking were activated so as to enable and optimise the design of knowledge generation activities. The idea was that, by engaging in communications activities pertaining to visibility and networking, the audiences, methods and media would effectively be tested so as to inform activities related to knowledge generation.

Figure 1 provides an overview of the ROER4D communications strategy. It depicts the main channels and strategies for internal communications (with ROER4D researchers) and external communications (established audiences and stakeholders). Channels (such as Facebook, the project blog and newsletter) and a specific communications strategy (e.g. blogging, social media) have been combined for simplification because the channel selected informs the strategy, and *vice versa*. Decisions about scheduling and timing were mostly determined in the process of trying to balance the needs of audiences with the resources available. Some activities (such as weekly announcements and newsletters) were regular, while others were activated in response to events (such as conferences and media invitations).



**Figure 1: Communications strategy channels overview**

**Reflection point**

It is likely that new communication channels will emerge and some will be abandoned as the project evolves. Taking an agile approach means not being afraid to drop a channel if it doesn't seem to be working or is too resource intensive.

Table 2 presents communication outputs by media type, along with the particular channel with which each are associated and to which communications purpose this aligns. The key communications channel was the project website. Because this is such an all-encompassing element, serving as a catch-all for a number of different possible communications possibilities, specific pages or elements of the ROER4D website are highlighted as they each served a specific purpose in the overall communications strategy.

**Table 2: Overview of ROER4D communications outputs mapped to associated channels and purposes**

Communications output	Channel	Purposes
Tweets	Twitter	Visibility Networking (primary) Knowledge generation (secondary)
Facebook posts	Facebook	Visibility Networking (primary) Knowledge generation (secondary)
Website – Sub-project pages	Website	Visibility Knowledge generation
Website – Gallery	Website	Visibility
Website – Directory	Website	Visibility Networking
Website – About menu	Website	Visibility
Website – Outputs (e.g. edited chapters)	Website	Knowledge generation
Blogs	Website blog tool	Visibility Knowledge generation (primary)
Weekly announcement email	MailChimp	Networking – internal (primary) Visibility (secondary)
Newsletter	MailChimp	Networking Knowledge generation (primary)
Conferences	Face-to-face, online (e.g. Adobe Connect)	Networking Knowledge generation
Presentations	SlideShare	Knowledge generation (primary)
Articles	External media, usually digital	Knowledge generation (primary) Visibility (secondary)

**Reflection point**

Each content output is likely to have its own associated production process. It is important not to underestimate the time and effort it takes to develop content outputs.

## **The evolution of media and channels**

The ROER4D communications plan evolved iteratively over the lifecycle of the project. This is inevitable with any communications strategy; what is important is that the communications purposes continue to be useful and communications objectives continue to guide the development of activities. In the course of the project, some of the communications objectives were achieved or came close to being achieved, others became less important as the project focus changed, or changed due to new information becoming available.

It is obviously a success if a communications objective has been achieved; it is, however, still a useful outcome if it is found that a communications objective needs to be changed and this is done within the project period. One of the criticisms of strategies and objectives is that sometimes they become divorced from the realities of practice and are either ignored or become a millstone. It is important to remember that objectives are there to enable and guide activities, but it is possible (as was the case with ROER4D) that a part of an objective might be superseded if new information or a new strategy comes to light. Taking these insights on board and reviewing, abandoning or reconceptualising an objective is part of a practice-based communications approach.

## **Monitoring communications activities**

Monitoring communications activities is an integral part of a communications strategy. This helps to keep the strategy on track, enabling changes as data emerges and allowing for evaluation of effectiveness. Monitoring can happen on an ongoing basis or at scheduled milestones. In the case of the ROER4D communications strategy, a number of monitoring strategies were established as part of the project's formal evaluation process. These monitoring strategies provided input into questions that would inform how well the communications activities were meeting the communications objectives. The key questions that were part of the formal evaluation of the communications strategy were:

- To what extent has the project gained visibility and credibility in the OER community?
- To what extent have the research processes and outcomes reached the OER research community?
- Through which methods and media have the internal network members increased their "sense of belonging"?
- Through which methods and media have the internal network members increased their research capacity?

The ROER4D Evaluation Advisor implemented a number of data-collection activities and provided reports and recommendations. This was useful for iteration and fine-tuning of the communications strategy, as the following two examples related to social media and the project website illustrate.

In terms of social media, monitoring the ROER4D Twitter account revealed how Twitter was being used, the number and frequency of tweets, and what level and types of interactions were most typical. Initial reporting suggested that tweeting around live events and conferences was particularly useful for gaining followers and gaining visibility; this aspect was therefore emphasised.

An analysis of Twitter audiences also suggested that Twitter activity was mainly attracting Global North audiences. By contrast, Facebook social media activity, which was less prominent, was attracting and could therefore potentially appeal more to Global South audiences. Based on these insights, it was decided to increase the ROER4D Facebook presence.

In terms of the project website, analysis of the website analytics, including a number of reports on popular and useful pages, fed into a mid-project redesign of the website. Based on an analysis of Google Analytics data, a website redesign was instigated, taking into account some of the recommendations around what audiences were finding useful and how the website design and information architecture could be optimised so that the project research processes and outputs could be made more readily available to the OER community and other stakeholders.

#### Reflection point

Choosing what to monitor is crucial if you wish to make the best use of available time and resources. It is useful to focus on what is realistic and actionable.

### Phase 3: Iterating and responding to audience needs

The ROER4D communications strategy was never intended to be a static document or reified set of activities, but a live and ongoing approach that responded when a better or more nuanced view of any of the key aspects – audiences, objectives or channels – was available. What was known at the beginning of the project with regards to audiences and stakeholders changed, while some objectives became less important or needed refocussing and therefore required new or adapted communications activities, new channels or new ways of using those channels.

Below are some examples of activities that changed or were refocussed, relating to audience, objectives, channels, and monitoring and evaluation.

#### Review of audience profile

A need for a better understanding of the project's likely audiences led the Communications Advisor to conduct a more detailed audience and stakeholder mapping as the project progressed. The initial stakeholder list was based on the outcomes of a workshop held at the beginning of the project and focussed primarily on the OER community, OER policy-makers and OER institutional practitioners. Once the project was underway, a more detailed mapping process was undertaken. This mapping exercise involved analysing interviews with ROER4D researchers, mining data from the proposals of the seven new sub-projects that joined as part of the impact studies cohort and analysing existing data, including Twitter audiences and conference interactions.

The more detailed mapping is summarised in Table 3, with audiences mapped to specific communications purposes. One subtle shift was a decision to appeal to the wider open education community as well as the identification of specific audiences of relevance.

#### Review of objectives

The Communications Advisor reviewed the communications objectives in the course of project activity and considered rewriting some of these. However, after discussion with the Network Hub, it was decided that while some of the objectives were less

important due to resource constraints, the main objectives would remain in place. It was also agreed that there would be a shift to focussing the project's communication work and monitoring of communication activities towards the knowledge generation objectives, as the sub-projects were nearing the stage of project activity where they would be reporting on their findings and releasing final outputs. This shift was also an acknowledgement that visibility objectives were being met through the project's ongoing activities, and that attention to the communication of research outputs in order to meet the knowledge generation purpose was now a priority.

This decision was also prompted by a clearer understanding of what outputs would constitute the final project outputs, with a key decision being made that an edited volume would constitute the project's primary research output. Once this decision was made, the focus of the communications strategy was pivoted to service this goal. The Communications Advisor worked closely with Curation and Publishing Manager in the design and production of the project's final outputs in order to enhance communications activity.

To this end, the objectives relating to research capacity building in terms of research design and research operations also became less prominent as the project progressed and researchers entered the final reporting phase and were being supported individually by the PI, Deputy PI and Publishing and Project Manager through a scaffolded developmental editing process.

**Table 3: Summary of audiences mapped to communications purposes**

Purpose	Audience/stakeholder group
Visibility	<ol style="list-style-type: none"> <li>1. Government/policy-makers</li> <li>2. Teachers/educators</li> <li>3. Institutions (higher education institutions, schools)</li> <li>4. OER/open education community (practitioners and researchers)</li> <li>5. Global researchers</li> <li>6. Funders</li> <li>7. Development community</li> <li>8. Others (specific interest/discipline)               <ol style="list-style-type: none"> <li>a. Textbook publishers</li> <li>b. Open data community</li> <li>c. MOOC providers</li> <li>d. Language practitioners</li> </ol> </li> </ol>
Knowledge generation	<ol style="list-style-type: none"> <li>1. Government/policy makers</li> <li>2. Teachers/educators</li> <li>3. Institutions (higher education institutions, schools)</li> <li>4. OER/OE community (practitioners and researchers)</li> <li>5. Global researchers</li> <li>6. Funders</li> <li>7. Development community</li> <li>8. Others (specific interest/discipline)               <ol style="list-style-type: none"> <li>a. Textbook publishers</li> <li>b. Open data community</li> <li>c. MOOC providers</li> <li>d. Language practitioners</li> <li>e. etc</li> </ol> </li> </ol>
Networking	"Internal" ROER4D researchers and OER community
Research capacity development	"Internal" ROER4D researchers

## Review of channels

Changes as a result of new insights into audiences and re-prioritisation of objectives required a review of channels. While the main channels presented in Figure 1 remained the same, the strategies behind how the channels were used were altered as a result of new information and operational decisions made by the Network Hub.

In terms of the project website channel, changes were made to the design of the sub-project pages and to the overall architecture in order to optimise the presentation of findings and results. Changes were also made to website architecture in order to optimally profile the project edited volume and associated outputs.

In terms of the Facebook channel, the popularity of Facebook for Global South audiences compared to Twitter prompted the inclusion of Facebook as a medium for sharing research outputs and a platform to engage selected groups of stakeholders.

## Changes to monitoring and evaluation

The monitoring and evaluation strategy set up by the Evaluation Advisor provided a sound and objective basis for tracking the effectiveness of the communications strategy. As the project progressed, the Communications Advisor was able to tweak and adjust communications activities with the understanding that this provided a better understanding of the communications terrain, including likely audiences and stakeholders.

This tweaking was undertaken with the proviso that it would be limited and subject to constraints – not only related to available resources, but to the particular nature of a research project. In a research project, where findings and results are typically released at the end of the project, there is often little time to implement communications strategies that could then be evaluated because the funding for the project ends when the research ends. ROER4D was fortunate to receive an extension for dissemination work, and communications activities were adjusted with this aim in mind, but there was still little possibility of being able to monitor longer-term impacts and uptake of the research, as the research outputs in the form of the edited volume and communications activities in terms of the accompanying media assets and messages to get the outputs to desired stakeholders took place in the final stage of project activity.

## Sharing the communications strategy

ROER4D was fortunate to have the services of a Communications Advisor and the benefit of mentorship from the DECI-2 project.<sup>7</sup> Given the fact that not all projects have the benefit of this kind of resourcing, the Communications Advisor utilised available opportunities to share the lessons learned in the ROER4D process of developing a communications strategy. This was primarily done at conferences, such as the 2015 Open Education Global Conference (Walji, 2015) and the 2016 Association of Business Communications Regional Conference (Walji, 2016).

A particular area of interest was to make explicit how the communications strategy and the research activities aligned. A poster presented at the 2017 Open Education Global Conference (Walj, 2017) attempted to map key research activities to milestones in the development of the communications strategy, highlighting specific tasks and roles at each stage.

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7 See the DECI-2 case study for further detail on the collaboration with the ROER4D project: [https://evaluationandcommunicationinpractice.net/wp-content/uploads/2017/10/Dhewa-Quarry-Ramirez-Brodhead\\_ROER4DCaseStudy\\_2017.pdf?189db0&189db0&189db0&189db0](https://evaluationandcommunicationinpractice.net/wp-content/uploads/2017/10/Dhewa-Quarry-Ramirez-Brodhead_ROER4DCaseStudy_2017.pdf?189db0&189db0&189db0&189db0).

## Conclusion and reflection on lessons learned

This chapter provides an overview of the development of a communications strategy for a large, multi-region research project. The additional complexity of managing research communications for a multi-stakeholder research project necessitates informed and intentional design along with an approach to being willing to make changes and iterate. This complexity is partly mitigated by the situational context – that of a large and relatively well-resourced team with a dedicated staff member focussed on communications activity.

Reflection on these constraints and opportunities has provided some useful lessons that may be of use to projects engaging with multiple research projects and those which work across a number of geographic and cultural contexts.

### Enabling leadership environment

The communications function was fully supported by the project PI and other Network Hub team members. This enabled communications to form an integral part of the research project rather than an afterthought or add-on. While the resourcing for this was a funder stipulation which included mentoring from the DECI-2 project, the manner in which this was operationalised based on considering communications as a core part of the research project's activities. Practically, this meant that the Communications Advisor functioned as a member of the Network Hub and developed and implemented strategies in cooperation with other team members, gaining insights from sub-project researchers which fed into ongoing activities. This enabled communications to be a central activity in the research process.

### Scope and resourcing

The resourcing for the communications function was focussed on supporting the Network Hub's communications efforts, rather than individual sub-project communications. The sub-projects, located as they were across three continents and 21 countries, had their own contexts that spanned cultural, geographic and linguistic dimensions, and with which the hub-based Communications Advisor could not fully engage. That said, certain sub-projects were part of larger organisations through which they could strategise and mount their individual communications efforts, which were supported by the Network Hub as far as possible. The Communications Advisor amplified communications and dissemination activities undertaken by sub-projects through the established channels to gain wider exposure for the sub-project work. This is a particular challenge to network-based research projects and a number of strategies evolved to respond to some of these factors.

### Challenges of open communication approaches

The discourse around notions of openness as a form of social justice, of freedom, and of enabling access would seem to suggest that "open communication" strategies would be a high priority for the communication of OER research; yet there are differing interpretations of what open communication looks like and how it might be achieved, especially as different groups of OER stakeholders emerge (Weller, Farrow, Pitt, de los Arcos & McAndrew, 2016). Particular challenges include decisions around when and how to communicate with stakeholders and when to take account of contextual situations of individual researchers, including what support researchers require in order to be able to



engage with research communication methods. With all these considerations, pressures and opportunities, communication strategies and implementation approaches become more complex in an increasingly open world.

While ROER4D promoted an open communications approach, sharing as much as possible from the early stages of research activity, there can be discomfort in sharing across cultural and geographical contexts and raise tensions in terms of launching research communication before findings are formally released. These issues may be exacerbated in developing or Global South contexts due to uneven access to resources and notions of centre and periphery. These issues provide tensions that need to be acknowledged and made explicit throughout the development of a communications approach that itself is subject to critical analysis and takes a pragmatic rather than idealistic approach to what is possible.

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