

The 4-P Workshop

Designing Communications and Education

Strategies for Conservation Projects

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INTRODUCTION

Conservation is still a new and dynamic activity. Twenty years ago, natural resource protection was quite a different science than it is today. Conservation awareness, a fledgling component of new initiatives to protect Earth's richness, lacks the historical precedent upon which to build. Therefore, each new project in this arena has the potential to be ground breaking. Most of our projects are new and must be innovative, and there are no easy step-by-step instructions. Creativity, field experience, and lessons from previous successes and failures have been our teachers.

During the last eight years, Conservation International (CI) and its International Communications Department have been challenged to find innovative ways to touch people—their minds and their hearts—and ultimately to inspire them to change their behavior in favor of conservation and a healthy environment. To be effective, a conservation awareness strategy requires strict attention to local reality and demands an action plan tailored to local cultural and social conditions. Its design must integrate the participation and knowledge of local, national, and sometimes international experts. To respond to this challenge, our International Communications Department has developed a creative workshop that gathers conservationists, communicators, representatives of different stakeholders, and CI's communications specialists to jointly address the challenges and priorities of a specific ecosystem, using communication and education techniques.

The 4-P Workshop is the result of our need to develop a technique to custom-design communication and education strategies. In May 1995, when CI's Colombian Board member, Julio Mario Santo Domingo, invited the International Communications Program to devise a communications strategy for Cartagena and its surroundings, we organized a unique gathering in this colonial town. More than 35 communicators, conservationists, businesspeople and local authorities brainstormed during six full days, giving birth to a vibrant initiative: Cartagena Convida. This creative workshop in Cartagena was to become the starting point of a new way to address communications planning.

Applying techniques learned from advertising agencies and workshop methodologies in order to complement our own experience, we conceived this tool for CI programs. The basic idea was to gather, during two full days, a group of 30 creative people from different disciplines to discuss and create a communications strategy specific to an area.

This selected group of creative professionals analyzes the environmental challenges threatening a particular ecosystem or protected area, identifies the objectives of the strategy, studies the different audiences and stakeholders, selects the most appropriate communication tools to reach the priority publics, and, finally, compiles all this information into an action plan. We named this exercise the "4-P Workshop," as its four sessions begin with the letter "P": Problems, Publics, Products, and Plan. Today, the 4-P Workshop is CI's tool for designing comprehensive and well defined conservation awareness strategies.

Since 1996, we have applied this methodology more than twenty times in twelve countries and five languages to participants of a wide variety of cultures. We have seen that this methodology can be adapted successfully to produce unique outcomes for local awareness strategies. Although originally conceived for the design of communications strategies, the methodology has been used to create Environmental Education (EE) strategies at both the national and community levels.

The results of the workshop are compiled into a 30- to 50-page Action Plan, filled with valuable data about audiences and tactics. The Action Plan has two levels of application:

- 1) If funds are available, the Plan can be used as a guide for implementing the strategy.
- 2) If funds are not yet secured, the document becomes the communications or education component of a proposal for a new project. This allows for successful integration of awareness activities with the overall conservation plan at an early stage.

This is a simple, step-by-step manual. It was created to help workshop organizers and facilitators follow well-defined activities in the process of creating a conservation awareness strategy. It is organized according to the different sessions of the workshop and provides a general explanation as well as specific recommendations for each session. We have added practical examples after each step wherever they are relevant. These examples have been extracted from 4-P Workshops held by CI's International Communications team with CI's regional programs.

Although this manual was written principally for CI's programs, we hope it may be applicable to other organizations which need to design conservation awareness strategies. We hope it will help generate accurate, effective, and culturally sensitive campaigns that will ultimately contribute to more harmonious and conscious attitudes and behaviors in favor of biodiversity conservation.

Washington, D.C., August 1999

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List of workshops conducted as of August, 2003:

CITY	COUNTRY	THEME
Tuxtla	MEXICO	Lacandona Rainforest
Mahajunga	MADAGASCAR	Ankarafantsika Reserve
Guaymas	MEXICO	Gulf de California
Georgetown	GUYANA	Protected Area System
Cape Coast	GHANA	Kakum National Park
Flores, Petén	GUATEMALA	Maya Biosphere Reserve
Washington, DC	UNITED STATES	Global Amphibian Camp.
Caravelas, Bahia	BRAZIL	Abrolhos National Park
Antsirabe	MADAGASCAR	Nat'l Environment Strat.
Marahoue	COTE D'IVOIRE	Marahoue National Park
Mahajanga	MADAGASCAR	Mahajanga Region
Mahajanga	MADAGASCAR	Ankarafantsika
Cape Coast	GHANA	GHCT
Rurrenabaque	BOLIVIA	Madidi National Park
São Paulo	BRAZIL	Alliance – Atlantic Forest
Accra	GHANA	National strategy
Santa Clara	MEXICO	Youth EE Strategy
Rurrenabaque	BOLIVIA	Protected Area EE
Fazenda Rio Negro	BRAZIL	Cerrado-Pantanal Corridor
Sukabumi	INDONESIA	INFORM
La Paz	BOLIVIA	Vilcabamba-Amboro Corr.
Lima	PERU	Vilcabamba-Amboro Corr.
Maddela	PHILIPPINES	Sierra Madre Corridor
Accra	GHANA	National EE Strategy
Puerto Princesa	PHILIPPINES	Palawan

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The staff of the United States Agency for International Development who participated in and financially supported 4-P Workshops in Flores (Guatemala), Antsirabe (Madagascar), and Cape Coast (Ghana);

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ORGANIZING A 4-P WORKSHOP

Defining the Focus of the Strategy

In order to create an efficient communications strategy, it is critical for the organizing staff to thoroughly define the theme and the scope of the strategy prior to the workshop. Generally, the the more focused the objective, the more precise the design of the strategy will be and the more successful the results.

For example, it is more effective to hold a 4-P Workshop for a specific project or ecosystem than for an entire country. It is even better to address a specific goal, such as the creation of a protected area, awareness of particular threats to a region, launching of new conservation initiatives (ecotourism, economic alternatives), or awareness of the biological importance of a certain area. However, the workshop may also be effective when used to create broad frameworks to gain the commitment of high-level participants, such as governmental officials.

Mexico: Conservation Awareness for the Gulf of California Ecoregion

Madagascar: Ecological Importance of the Ankarafantsika Nature Reserve

Guyana: Establishment of a Protected Areas System

Ghana: Creating an Educational Framework for Ghana that incorporates biodiversity concepts.

Choice of Site

The 4-P Workshop can be held in any meeting room that can sit approximately 30 or 35 people. It should be an easily accessible location. Some possible meeting places might include the organization's local office (when large enough); hotel conference room; cultural center; public library; local or regional government building; or university conference room.

The facility should be able to provide lunch and coffee-breaks, or outside catering can be arranged. In order to stay on schedule , participants should not leave the premises at lunch time .

The meeting room should have tables, empty walls on which to affix sheets of paper, two flip charts, and if possible, access to an overhead projector, slide projector, data projector or TV/VCR.

Materials Needed

- ◆ Large paper for flip-charts (50 sheets or two pads)
- ◆ Masking tape (to fix paper sheets on the wall)
- ◆ Index cards, preferably in varied colors (200)
- ◆ Colored markers for flip charts
- ◆ Note paper for participants
- ◆ Pens or pencils

Selection of Participants

The ideal number of participants is between 30 and 40 people. The workshop is designed to be highly participatory, and every person will have his/her ideas included in the process. Therefore be sure to invite key people who can bring substantial experience from different fields. In addition to the staff of the organization responsible for the management or the execution of the project, invite the following types of people:

- ◆ Conservationists and communicators from partner NGOs
- ◆ Conservationists and communicators from government agencies
- ◆ Members of the media (local, regional, national)
(These people must be invited as workshop participants but *not as reporters*. Stories may be published, but only after the workshop has concluded. It is important that the articles not unveil the strategy)
- ◆ Other communicators
(Such as advertisers, public relations specialists, event promoters, marketers, designers)
- ◆ Representatives of the private sector, industry, or community directly related with the focus of the strategy (whether they are part of the problem or the solution)
- ◆ Sociologists or historians familiar with regional trends

In addition to the above, invite the following to an EE workshop:

- ◆ Primary and secondary school teachers
- ◆ Representatives of the education system: i.e, representative of the regional office of the Ministry or Department of Education, curriculum development specialists, in-service or pre-service teacher trainers (teacher training college representatives)
- ◆ Representative of organizations that work with youth in the region (e.g. health, youth development or religious organizations)
- ◆ Mature youth with demonstrated leadership skills
- ◆ Parent (e.g. representative of parent organization at a school)
- ◆ Church representative (especially someone who works with youth)
- ◆ Staff of government agencies who are specialists in the fields of environment, youth development or education

In some particular cases, workshop organizers may choose to cover travel and/or lodging expenses for a key participant.

The workshop is not a media event. However, media professionals are valuable participants for the workshop for their insight into the dissemination of information. After the workshop, if it is appropriate, a press release can be drafted and sent to the press.

Carefully select participants to include different perspectives and alternative viewpoints. Ideally, the workshop should be comprised of a varied yet cohesive group, united by a shared goal to create a communications or education strategy.

Send the invitations early, preferably two or three weeks before the workshop. Contact the presenters in the “Problems” session even earlier, as they will need to do more preparation. It is important to send a short explanation of the 4-P Workshop, together with a simple agenda of the two-day event, so participants will know what to expect.

Participants should also have the following characteristics:

- ◆ Interest in the theme
- ◆ Influence and respect in the community
- ◆ Knowledge in some area
- ◆ Cooperative and participatory nature

Facilitator and Workshop Staff

The 4-P Workshop can be held with two facilitators responsible for the dynamics of the meeting. They should be supported by two people (preferably from the organizing staff) who 1) will serve as a secretary/typist to take thorough notes of the workshop; and 2) a logistical coordinator to organize the venue, catering, transport, etc. Good notes and minutes are essential for the preparation of an accurate final report. Prior to the workshop, request that presenters prepare a one-page summary of their presentation to be included in the final report of the workshop.

Basic Agenda for the 4-P Workshop

The agenda of the 4-P Workshop is divided into four sessions. Depending upon the theme of the workshop, the length of the workday, and the speed of the participants, the workshop may be two or three days in length. Below is an agenda following the two-day model.

Agenda

Day One

Opening and First **P**: PROBLEMS

Second **P**: PUBLICS

Day Two

Third **P**: PRODUCTS

Fourth **P**: PLAN and Closing

THE 4-P WORKSHOP

Opening

Presentation of Project Director (5 minutes)

The Project Director opens the first session of the workshop with a brief description of the purpose of the workshop. He or she thanks all participants for their presence and encourages them to join actively in the creative process. If it is appropriate, he or she can invite an official representative to open the workshop. At the end of the presentation, the Project Director introduces the facilitator.

Presentation of Facilitator (10 minutes)

This is a very important short presentation that should set the stage for the dynamics of the workshop while underlining the importance of communications in a conservation strategy. This presentation should include and highlight the following:

- ◆ Acknowledgments to participants for their presence.
- ◆ People should suspend their expectations of results until the last session.
- ◆ Importance of communications and education as a component of any conservation effort, and its effects on credibility, influencing decision-makers, and awareness of threats and solutions.
- ◆ The value of promotion in today's world. The need to communicate the "conservation message" strategically and accurately.
- ◆ An invitation to fully participate in the workshop and to understand that the methodology is designed to enhance the creative process.
- ◆ A brief explanation that the methodology is the result of combined techniques that includes ZOPP (a German project planning framework) and publicity or marketing agency exercises. The 4-P methodology should be presented as a template only. It is important to explain that the 4-P is designed to incorporate and address cultural and social intricacies. The template has successfully been used to design communications and education strategies in five languages and in a wide variety of countries.
- ◆ A statement that the key players in the workshop include the participants who are knowledgeable of the region and its particulars.

Introduction of Participants (1 hour)

In order to establish a more intimate relationship between the participants, use the following technique for each person's introduction:

- ◆ Organize participants by pairs (two people). It is ideal if they have not known each other previously.
- ◆ Each person of the pair interviews the other for three minutes and takes notes, looking for some intimate aspects of his/her life. Hobbies, family, anecdotes, dreams or passions will bring out the person behind a formal professional title as well as bridge gaps between participants of different backgrounds.
- ◆ Each pair comes to the front of the room and each participant presents his or her partner with a synopsis of the results of the interview (two minutes per person). Participants should not speak about themselves.

The "Problems" are issues, threats or challenges that a conservation effort faces in a specific region or circumstance. These are the issues that the communication strategy will address directly to reach its goal. In this session, identifying and clarifying the Problems will lead to defining the campaign's objectives and later to determining the Publics to whom a message should be targeted.

The session is divided into six steps:

Step One - Background Presentations (1 hour)

To set the stage for the identification and definition of the Problems, the session begins with three to four 10- to 15-minute presentations about the selected region or ecosystem. These can be enhanced by the use of visual aids such as slides, videos, or overheads. *Ask each presenter in advance to prepare a one-page summary of his or her presentation to be inserted into the final report.* Presentations should focus on a variety of viewpoints, such as:

- ◆ Importance of the region and what threatens it
- ◆ Biological or ecological background
- ◆ Historical background in terms of people and natural resources
- ◆ Social and cultural issues
- ◆ Economic activities including both threats and possible alternatives
- ◆ Research or polling data revealing people's knowledge or attitudes about the region, issue, or threats

Presentations of Problems should provide an overview of the threats to the ecosystem. Prior to the workshop, the Problems and the individuals chosen to present information about these challenges during the workshop should be identified by the NGO organizing the seminar.

Please note that this is not a time for a government official to address the history of his/her conservation efforts nor for an NGO member to criticize some other institution's lack of, or misguided efforts. During or immediately after each presentation, the facilitator should outline the major problems and threats introduced by the speaker. This should be described in key words and concise thoughts. This outline should be posted in full view of the participants.

Step Two: Identifying Problems (5 minutes)

Following the presentations, pass out an index card to each participant. The participants should reflect on the information presented and then write the five problems or challenges that he/she considers a priority according to the main purpose of the strategy.

Card of Threats/Problems, Mexico

Habitat degradation
Lack of "ownership" of, and pride in natural resources by local communities
Lack of consensus to promote conservation awareness in the region
Illegal human settlements inside protected area
Deforestation

Step Three: Creating a List of Problems (15 minutes)

Ask the group to then begin to share their list of problems. If the same problem appears two or more times on the cards (even if worded differently), it should be listed only once.

This process requires discretion on the part of the facilitator to discern when two different entries actually describe the same Problem. For example: "Lack of Conservation Awareness" and "Lack of understanding the importance of protecting biodiversity" may be listed as the same.

Once the list is created, the participants should be given one last opportunity to add to the list of Problems. To prepare for the next step, it is helpful to number the Problems.

Step Four: Prioritizing the Problems (20 minutes)

Distribute index cards again to the participants. They will list the numbers for the five most critical Problems from the list. Encourage participants to think carefully about the most critical problems facing the ecosystem. Reiterate that this workshop is seeking to create a strategy that uses communications and education techniques to address a problem. Some root problems, such as poverty, population and natural disasters, are beyond the immediate reach and scope of the strategy.

With the support of two or three volunteers, collect the cards and tally the votes on the flip-chart pages. The priority problems should be highlighted and listed again. Generally, the final list is comprised of six to eight problems.

Problems Prioritized in Kakum, Ghana

(number of votes in parentheses)

Weak communications/ mistrust between park and communities (12)
Elephant crop raiding (12)
Lack of involvement of private sector, district assemblies, NGOs, Chiefs, etc. (10)
Poaching and illegal activities (8)
Lack of poverty alleviation alternatives/projects (8)
Lack of environmental education (6)
Poor park staff capacity (5)
Poor infrastructure at park (logistics, transport, etc.) (5)

Step Five: Adopting a Final Objective for the Communication Strategy (20 minutes)

This final step is very important. The facilitator should previously have created a template sentence which encompasses the goal of the communication strategy, such as, "To maintain the natural integrity of the Maya Biosphere Reserve, a communications strategy should..." or "To raise conservation awareness in Madagascar, a nationwide communication strategy should address..." or even "A communications strategy for the Kakum National Park should..."

In order to speed the process, draft the strategy's priority objectives using the priority Problems over a break or lunch, depending on the timing.

After the break or lunch, demonstrate how you used their list of Problems to create positive objectives statements. Encourage them to share any concerns or to refine these objectives. The objectives will guide the rest of the workshop, and be the foundation for the strategy, so it is important for it to clearly reflect the group's opinions.

Once consensus is reached, the objectives should be posted during the rest of the workshop in a prime location.

Each Objective should be numbered. This will be useful at the end of the workshop when these numbers will serve as a reference while designing the Plan. The numbers do not necessarily reflect order of importance.

Objectives, Maya Biosphere Reserve, Guatemala

In order to maintain the natural integrity of the Maya Biosphere Reserve (MBR), a communications strategy should:

1. Generate real and correct information in order to familiarize government officials with the importance of the MBR;
2. Promote the environment as a high priority for the national government;
3. Encourage potential migrants to the Petén Region from other parts of the country not to move;
4. Raise awareness in local and national audiences about the importance and benefits of protecting the natural resources of the MBR;
5. Support family planning initiatives;
6. Disseminate cost/benefit analysis of development projects in the Petén, in particular oil concessions, cattle ranching, and timber extraction;
7. Disseminate information about legal actions related to the Petén environment.

Second P: Publics

The “Publics” are the targeted sectors of the population or audiences to whom the conservation message will be addressed in order to reach the final objective.

Special guests could be invited for this session such as representatives of possible target publics that are directly connected with the conservation issues of the region. In the Gulf of California, for example, fishermen, fishing company owners and tourism operators were invited. Other special guests might include “multipliers of information” or “opinion-makers” such as journalists, educators, or artists.

This session is divided into 6 steps:

Step One: Creating a List of Potential Publics

This is a collective brainstorming session designed to list all of the possible publics that may be related to or have some impact on the overall goal of the workshop.

As the participants name the different publics, the facilitator creates a list on a sheet of flip-chart paper, avoiding repetition. Encourage everyone to participate. Search for specific publics that may be unusual but important as part of the problem or solution of the conservation issues in a region. Have a pre-written list of potential publics (such as the list included on the next page) to encourage creativity and to lessen the chances of forgetting some key audiences.

Refer back to the list of objectives and highlight the Publics which are already obvious. As an example, in the objectives on page 18, there are some publics which were previously named, such as “government officials,” “migrants,” “local communities,” “general public,” “women,” “private sector,” and “judiciary authorities”.

When the list is completed, post the lists on the wall.

Potential Publics

- ◆ General Public
- ◆ Decision / Policy-makers
- ◆ Community Leaders
- ◆ International Multilateral Organizations
- ◆ Donor Organizations
- ◆ Local NGOs
- ◆ Journalists / Media Professionals
- ◆ Educators
- ◆ Housewives
- ◆ Students
- ◆ Scientific Community
- ◆ Youth Groups
- ◆ Religious Groups
- ◆ Local Businesspeople
- ◆ National Industry / Private Sector
- ◆ International Businesses
- ◆ International Government Officials
- ◆ Tourists
- ◆ Tourism / Hotel Operators
- ◆ Law Enforcement Agencies

For an EE workshop, potential publics may include:

- ◆ Primary, secondary and tertiary students
- ◆ Out-of-school youth
- ◆ Teachers (all levels)
- ◆ Teacher trainers
- ◆ School directors
- ◆ Park guards
- ◆ Religious leaders
- ◆ Researchers
- ◆ Parents
- ◆ Extension workers

Step Two (Optional): Organizing Publics by Geographical Scope (25 minutes)

This step is optional, although may be especially useful for broadly- focused workshops that are creating strategies for various sectors and geographic scales. For example, a workshop aimed at both national level outreach and community-level education may need to include this step.

Looking at the general list of publics previously created, the participants may now categorize the list according to geographic scales. Divide the Publics in four different categories, labeling them “National”, “Regional”, “Local”, and “International”. Sometimes a public may overlap into two or three categories.

You may decide, if time is running short but you wish to include this step, to simply label the original lists with the letters: “L” (local), “R” (regional), “N” (national), and “I” (international) according to their scope. Use different colored markers in labeling to further distinguish the categories.

Alternatively, it may be more appropriate to divide the Publics in only two categories: Urban and Rural. This is most likely the case when the theme of the workshop is broad and has a nationwide scope.

Step Three: Prioritizing Publics (15 minutes)

Posted on the central wall should now be the “Workshop Objectives”, as well as the lists of Publics organized by geographic scope. All other written material generated during the workshop such as the lists of Problems should still be accessible for all to see, but affixed further away from the center of the wall.

Distribute an index card to each participant to list the publics for each geographical category that he/she thinks should be considered priorities for the communications strategy. The facilitator should ask the participants to list three to five publics.

If Step Two (organizing by geographic scope) was used, then ask the participants to list three to five publics *per category* according to the number of publics in that category. For example: if “Local” has more than 15 audiences, ask for participants to name the five most important; if “International” has less than seven, then ask for three.

BREAK (15 minutes)

Step Four: Identifying Target Publics (20 minutes)

During the break, collect the cards and analyze the results with the help of two or three helpers. Tally the Publics each time it has been voted for by a participant. When the group returns, the facilitator should have listed the top five to six “Priority Publics” or the two to four Publics that received the most votes per geographic category. He or she may want to highlight any audiences considered multipliers such as media professionals, educators, or artists that were not included among the priority Publics.

Summary of Priority Publics for Kakum, Ghana

Local

Chiefs (23)
District Assemblies (17)
Communities (19)

National

Government (21)
Media (10)
Park Staff (11)
Visitors (10)

Regional

Regional Coordinating Council (11)

International

Donors (16)

Step Five: Designing Target Public Profiles

Encourage the participants to select four to six Publics among those most voted. The top Public in each category should be included, unless it is less relevant in a particular strategy. (For examples, the role of the International Public may not be as prominent as others.)

Divide the participants into groups of four to six people, writing the names of the participants in each group on a flip chart, and assigning a leader. When forming each group, take advantage of the people who are knowledgeable of that specific public. Include any representative of that Public that may be present at the workshop, such as government representatives or journalists.

Each group is responsible for designing a profile of a specific Priority Public. The group should discuss that public and put themselves “in the shoes” that public in order to produce a more realistic profile.

Post the following three questions on the wall. Each group should discuss the questions in relation to their Public, answering them as thoroughly as possible on a flip chart.

1. Who am I?

What is my level of education, occupation, goals, sources of information, character tendencies, habits, etc.? Where do I live? Regarding the issue, do I care about it? Do I have any knowledge of the issue?

2. What do you want me to do?

What should I do in order to help achieve the objective?

What behavior should I change?

Why am I not already doing this? (barriers)

3. What is in it for me? (Will FM?)

How will I benefit from responding positively to the message? (incentives)

As the facilitator, you and your helpers should visit each group to ensure they go beyond superficial descriptions of their target public. Detailed profiles should be written on flip chart paper. This information will be added to the workshop report. Quietly observe each group for a few minutes, offer suggestions, pose questions, and help them keep track of time.

The best information is obtained when the response to question #1 includes typical life-style details, hobbies, general interest, media used (magazines, newspapers, TV programs), professional interests and activities, family, information access, literacy and academic background, as well as interest and commitment to the environment.

Step Six: Presenting Target Public Profiles (80 minutes)

Each group delegates one member to present its profile to the other participants in a plenary session. This person goes to the front of the room to make the presentation. If necessary, the facilitator registers any additional elements of the profile on the flip-chart. After each presentation, the participants may add comments or remove inappropriate information. At the end, the facilitator should post the sheets for each target profile.

Profile of “Fishing Business Owner” from Gulf of California

“Who am I?”

I am involved in the business for investment opportunity.
Most of the people in the fishing industry are new to the business. It is not a family tradition.
We are mature people, married with families.
Our kids are well educated and attend colleges.
We have access to the Internet and use it for information.
We organize our day after our first radio communication with our boats and our industrial plant.
We watch “TV ECO” and “Al Despertar” in the morning.
We do not have much time to look at newspapers.
We manage 75 to 500 employees each.
We are in constant communication with the local Office of Fishing and the Fishing Industry.
We meet weekly with other owners in a hotel.
We have very poor information about conservation.
We travel at least once a month to the US to go shopping.
We support the government because it is in our interest.

“What do you want me to do?”

To become aware of the importance of conservation.
To share information with other owners about the most appropriate fishing techniques for the environment.
To understand that fishing resources will last forever if well managed.
To seek and apply more appropriate techniques for ecologically sound fishing.
To respect existing environmental and fishing laws.

“What is in it for me?”

I will no longer be associated with the environmental problem, but with the solution.
I will access the latest information on fishing techniques.
I will be able to use this natural resource and establish a long-lasting profitable company.

Third P: Products

The “Products” are the different communication tools, activities, or events that should be produced in order to reach the target publics.

Special guests for this session might include marketing professionals, publicity specialists, media professionals, and educators.

The session is divided into three steps:

Step One: Creating a List of Potential Products

Affix to the wall the final Public profiles as well as the list of the identified audiences and multipliers whose profiles were not analyzed.

This session begins with a collective brainstorm to identify all possible communications Products that may be used or produced to achieve the objectives of the strategy. Create a new flip-chart list of all potential Products mentioned by the participants. Include the Products that have been mentioned in the previous profile list.

When considering conventional mass media such as newspaper, radio, and television, it will help to list each type of media and then have the group identify the specific outlets and programs of those media which influence each public.

Encourage the participants to use their creativity and reach beyond conventional tools to envision new options.

It is useful for the facilitator to have a list of common communications Products as well as site-specific Products at hand. If any of these items are not mentioned by the group, but seem appropriate, be sure to suggest them at the end.

After this list is completed, the new sheets of paper should be affixed in the center of the wall. The profiles and their product list should also stay in sight.

Sample List of Communications and Education Tools

◆ Promotional Tools

Billboards
Posters
Community gatherings
Music (message through lyrics)
T-shirts
Caps
Bags
Stickers
Calendars
Newsletters
Pens/Pencils
Key Chains/Badges
Brochures
Banners
Internet, World Wide Web

◆ Radio

Talk shows
News
Drama, Plays
Religious programs
Forums for specific audiences
Advertisements
Entertainment

◆ Print Media

Newspapers
Magazines
Feature stories
Editorials
Opinion editorials
Supplements
Advertisements

◆ Television

News
Feature stories

Documentaries
Talk shows
Locally produced drama - Soap operas

◆ Events

Festivals
Contests (photo, essay)
Religious events
Community gatherings
Conferences, workshops, seminars
Concert
Theater/drama
Photo exhibitions
Video screenings
Booths at events
Journalist training

◆ Schools

Teacher's manuals
Teacher training
National curriculum development
Library collections
School field trips
Cartoons and storybooks
Eco clubs
Parades
Children's contests
Experiments and research
Drama (puppet shows, skits)
Mobile exhibits
Newspaper inserts for kids
Murals
School gardens
Games
Conservation projects
Music (festivals, songs)

List of Site-specific Communication and Education Tools

Ghana

Traditional Gong-gongs (community announcements)
Personal interactions
Durbar (gathering of chiefs)
Storytelling
Cloth designs (commemorative)
Taboos

Guyana

Sea wall advertisements
Radio and TV death announcements
Literacy projects

Sports events
Technical documents for mining and timber industry

Madagascar

Traditional clothing and wraps
Mobile information vans
Proverbs

Mexico

Technical documents of fishing techniques
Comic books with conservation themes

Step Two: Identifying Products to Reach Target Publics
(1 hour and 10 minutes)

Divide again into groups (one group per target Public), keeping, whenever possible, the same group configuration as when designing the profiles. Groups may have lost members if some were only attending the workshop for specific sessions. It is important then to keep a minimum balance in the number of people per group. If there are new guests from the areas of marketing, design and media, they should be evenly distributed among the groups.

Each group is responsible for identifying a set of Products that is appropriate for its target Public. Each group should integrate the information acquired in previous sessions. They should look for ideas that can best fit their target Public. Each group should be answering three questions:

- 1. What are the Products and activities that are most important in order to reach this target Public?**
- 2. What are the essential messages which could sensitize this Public?**
- 3. What are the tactics to reach this Public? What are the “do’s” and “don’ts”?**

BREAK (15 minutes)

Step Three: Selecting Products and Messages for Target Publics (1 hour)

Ask a representative from each group to come to the front of the room to present the set of Products and messages his or her group identified for its target Public. All the participants discuss these ideas. It is important for the presenter to explain the different products, messages, and the context in which they apply.

During the discussion, new products can be added and others removed or adjusted for more precise results. If necessary, the approved set of products can then be rewritten on a new sheet of paper and affixed on the wall adjacent to the target Public profiles.

Fourth P: Plan

The “Plan” is the last step of the workshop and the result of the assimilation of all the information produced during the previous sessions. It may be a series of campaigns or a strategy that will be used to create specific conservation awareness in a region. This is preferably a two-year plan that encompasses all the necessary steps for a successful outreach. This is not a final plan, as it should be created as an “ideal” plan.

As many participants of the workshop are not part of the organizing NGO staff, it is important to keep the results of the creative effort at a broad level, presenting several alternatives. The final strategy, based on resources and fund-raising potential, will be put together by the organizing NGO team, during an internal session, the morning after the workshop. All the participants should have been present for at least the previous session in order to be effectively included in the process of designing a Plan.

The “Plan” session is divided into four steps:

Step One: Identify Opportunities and Key Dates

(30 minutes)

A successful campaign often takes advantage of existing opportunities. As a group, brainstorm two lists: important dates which can be used as a hook to launch the campaign or any initiative; and existing resources, partners, and financial opportunities which may help make a campaign feasible.

Sample Dates

April 22: Earth Day
June 5: World Environment Day
National Park “Birthday” (Day of Decree)
National Day
Tree Day
Season of Fires / Slash-and Burn
Religious Festivals
Agricultural Fairs

Sample Opportunities

Local park available for events
New government initiative supports issue
New funding source available
Partner organization wants to help
New TV or radio show needs programs
Corporate sponsor expressed interest
Existing conservation club
Wall available in town center for mural

Step Two: Weaving Products into a Strategy (1 hour 45 minutes)

The goal of this session is to weave the Products and Publics into a strategy that would effectively address the Problems in order to accomplish the Objectives. Prior to the session, clearly post all flip charts from the previous sections on the walls around the room so that all participants can easily view them.

There are several ways to organize this session:

Option One - Divide the participants into **two** groups, each group having representation from each of the four to six groups who previously had studied the priority Publics and their Products. The group should create a series of activities, organized by either dates (timeline) or Publics.

Option Two - Divide the participants into three groups. Each group is tasked with creating a plan, but each group will organize their thinking differently. For example, one group may focus on the campaign timeline, another on publics, and another on objectives. Although all elements of the plan are included, their matrix (see next page) will be organized according to one of these three priorities.

Option Three - Divide the participants into four groups. Each group is assigned one of the major objectives (and therefore Problems) to address. Individuals within each group should be tasked with making sure the group addresses the major publics that are important for this objective. Additionally, someone should be tasked with helping the group think about a timeline for the campaign, taking advantage of the sample dates.

For all options, stress the importance of this session. The groups (no matter how many) should all have representation from each of the four to six groups who previously had studied the priority Publics and their Products. Groups should remember that a strategy is not just a list of activities, but there are “peaks” and “valleys” throughout the strategy. Suggest the groups find a comfortable setting (apart from the other groups) in which to work.

If time, each group should also brainstorm at least some of the following items:

- ◆ Sequence of events (arranged in a calendar format)
- ◆ The weaving of the different elements of the campaign
- ◆ Theme of a campaign
- ◆ Slogan ideas
- ◆ Logo ideas

Because this is a creative process, this session should not be limited by an existing budget or a proposal. This “reality- check” should only take place during the internal session the next morning.

The groups should create their Plans with a matrix that organizes date, activity/Product, Public, objective numbers, and if appropriate, the institution responsible for its implementation, location, and indicators.

Indicators are indexes for measuring objectives. They are used to study success or failure of each objective by measuring who, when, where, and how. For example, indicators for a PSA include what network aired the PSA, when it aired, and how many people were reached. They are essential for ensuring that each objective is carried out well for the success of the communication plan.

Date	Product/Activity	Public	Objective #	Location	Institut. Resp.
Date	Activity 1	Public 1	Obj #'s	Site	Resp. 1 Resp. 2
Date	Activity 2	Public 2	Obj #'s	Site	Resp. 1 Resp. 3

The matrices will be drawn on flip chart paper and assembled by the groups individually. The matrices should incorporate all the activities participants feel should be a part of the plan and may cover many pages of flip chart paper.

Below are three examples of activities presented in the form of the matrix.

1.	Date: October to December 1997 Activity: Create the Information Center for the MBR Target Publics: Decision-makers (nat'l & local), journalists, general public Objective(s): 1, 2, 4 Location: Petén (and the Capital) Responsible: ProPetén, CI
2.	Date: April 1998 Activity: Environmental journalist training workshop Target Publics: Journalists Objective(s): 1, 4, 6, 7, 8 Location: Petén (and the Capital) Responsible: National Environmental Council and CI
3.	Date: February 1998 Activity: Field trip for teachers Target Publics: Educators (local), school-children Objectives: 3, 4, 5, 7 Location: District school sites Responsible: CI / ProPetén

BREAK (15 minutes)

Step Three: Presenting Strategies (1 hour)

One or two representatives of each group will present their strategy to all the participants using flip charts. They will have about 20 minutes to explain their plan with details, and will answer questions from the general group. At this point, however, nobody should challenge that strategy. All the strategies should be affixed at the center of the wall.

Step Four: Extracting Common Trends and Priorities (1 hour)

This is the final step before the workshop concludes. At this point, stress the creative work and the huge amount of information gathered by the participants. The goal is to extract, with the help of all the participants, the common elements and the different priorities appearing in the strategies just presented. The objective is not to compose a final combined strategy (this will happen on the next day during the internal session with the NGO team), but rather to highlight the components that received wider approval.

To conclude, the facilitator should invite the project director or any special authority to address the participants with final words and thanks. The organizers should then hand out a workshop evaluation.

After the two long days of brainstorming, we strongly recommend that participants enjoy a 5th "P" the last evening: Party!

RESULTS OF THE WORKSHOP

Internal Session

The goal of the 4-P Workshop is to help create a comprehensive communications strategy. The results of this two-day exercise should provide the necessary information to make this goal possible. As mentioned earlier, the internal meeting of the organizing NGO should occur immediately following the workshop to design the final strategy.

This session should evaluate the two proposed Plans in order to produce the final strategy. The strategy should include a tentative calendar of events, preferably grouped into two or three phases. The activities chosen should be linked to specific funding sources.

The Final Plan, elaborated by this selected group, should also be prepared as a matrix. The columns in the previous matrix "Public", "Objective #", "Location", and "Institution Responsible" are not necessary for this exercise, and should be substituted by "Person Responsible for its implementation" and "Budget lines".

Be sure to close the meeting having discussed "Next Steps" regarding the report, fundraising proposals, budgeting, timelines, and groups responsible.

Report

The minutes and notes taken during the workshop by a secretary as well as the summaries of the presenters of the Problems session are necessary in order to produce the final document of the workshop. A staff member from the organizing project, preferably one of the note-takers or participants, should be assigned to reorganize this data and write a complete report.

Along with serving its purpose as an internal report and strategy, this document will serve as a base for any communications-related proposals for funding. The report should include all of the information generated during the workshop as well as detailed notes on the presentations of the Problems. The report may also make note of key comments by participants.

This report (or a brief summary of one or two pages) should also be distributed to all participants of the workshop, as well as a complete version to all donors involved in the project.

OTHER 4-P CONCEPTS

The idea of using “4-P” as the title of this creative exercise is not original at all. For many decades, a vast array of professionals have been utilizing the same acronym to summarize their concepts. Probably the most recognizable example is the “4-Ps of Marketing.” Created by a Michigan State University Professor in the 1960’s, these four letters stand for: Product (to be sold), Place (location in which to showcase), Price, and Promotion. Later, some marketing professionals added a 5th P, People, to highlight the importance of the customers. Others went even further, upgrading to the 7-P approach, attaching two more concepts: Premises and Profit.

Several other efforts to frame innovative ideas under the 16th letter of the alphabet exist around the world. Here are some examples:

- ◆ University of Bradford, United Kingdom, Department of Civil and Environmental Engineering: The 4-Ps to produce a report: Position (background information), Problem, Possibilities (possible causes and solutions to the problem), and Proposal (conclusion, outcome);
- ◆ Villanova University, Pennsylvania, Department of Computing Sciences, Laura Cassel: The 4-Ps levels of “firewall” protection in computer networks: Paranoid (no connection, everything forbidden), Prudent (explicit permission needed), Permissive (allow connections by default), and Promiscuous (everything is allowed);
- ◆ John Langrehr, Education Consultant, South Australia: The 4-Ps that good thinkers have in common: Positive (disposition), Patterns (are quickly recognized), Probing (key questions are asked), and Picture (key words to summarize information);
- ◆ University of Dayton, Ohio, Laura Hooper: The 4-Ps in a new attitude toward failure: People, Position, Parts, and Paper;
- ◆ Organization Technology Ltd, Singapore: The 5-Ps of organizational management: Process, Project, People, Program, and Product.