

**INTER-AMERICAN INSTITUTE FOR
GLOBAL CHANGE RESEARCH
(IAI)**

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Report of the Communications Task Force

May 16-17, 2001 São Jose dos Campos, Brazil

Participants: Bárbara Garea (BG) (chair), Paul Filmer (PF), Carlos Ereño (CE), Armando Rabuffetti(AR), Eduardo Banús (EB), and Marcella Ohira Schwarz (MOS).
PF communicated to the group that Vanessa Richardson was not able to attend the meeting.

The group approved the agenda (attached) presented by the chair and the communications officer, only reversing the order of the discussion items starting with the current communication mechanisms. The chair informed the group that the CTF should discuss in detail the planning and development of an IAI marketing strategy and that she would like to present to the CoP, at its next meeting, the IAI marketing strategy.

Initial Science Program Publication: Paul Filmer reported to the group on the production of this publication, which has been delayed in its production due to difficulties in the collection and standardization of the information from several IAI projects.

The plan now is to hire the services of a professional editor (Henry Lansford from UCAR). The idea is to have 2 publications: the first one would be about the CRN program and the second about the ISP. The publication should include the following information: project title; award amount in US\$; participants (PIs, co-PIs); institutions, contact address and numbers; executive summary (objectives and methodology); results to date (capacity building, number of students and thesis, list of scientific publications). PF and the IAI would need to collect, organize and provide all information on the CRN and the ISP I, II and III to the editor (according to the content described above). PF has asked UCAR for information regarding the ISPI and II, EB should provide information on the CRN, and the IAI will ask John Stewart to collect and provide information about the ISP to the editor.

It is unlikely that this first CRN publication can be published by July 2001 for the IGBP Open Science Meeting. Therefore, the plan is to produce an “intermediary” type of publication printing the information on a special IAI infosheet paper stock and using the IAI portfolio cover as a folder and have the final publication done by October (for the Human Dimensions Open Science Meeting). This publication will be published in English only.

New Brochure and IAI portfolio: The communications officer reported to the group about the work being done in the production of a new IAI brochure and portfolio, and showed the latest draft of the brochure, which will be ready for distribution in the end of May, 2001. The plan was to have it ready a month ago, but a fourth revision was necessary, which delayed the original schedule.

GEF/IAI Brochure: EB reported on the production of the GEF/IAI/WMO brochure and showed a first draft of the brochure to the group. He expects it to be finalized and ready for distribution within a month.

Newsletter: CE, editor of the newsletter, reported to the group about the changes adopted in the production of the latest issues of the Newsletter following the recommendations made by the CTF at its last meeting:

- Reduce length;
- Reduce unused space (maximize use of space available);
- Reduce weight of paper stock from 120 to 90grams/m²;
- Change type of paper stock;

- Change printers (reduce cost of printing);
- Reduce overall costs of newsletter (due to reduction of length, printing and mailing costs).

Some additional comments were: issue 24 was released on time (March 2001) and it was shorter than previous ones (28 pages).

The editor estimated the total budget for the production of the newsletter, for the new fiscal year, to be around US\$ 45,300, which means a reduction of almost US\$ 8,000 from US\$ 53,187.

The editor also exposed some concerns regarding future issues of the newsletter:

1. submission of material on time from the IAI staff. The editor believes we should work very hard to disseminate the results coming from IAI supported projects. Therefore, one interesting source of information could be articles from PIs. One idea is to invite 2-3 PIs to make a presentation at EC/CoP meetings and ask them to provide a written report to be published in the newsletter;
2. distribution of the newsletter: the CTF should re-think the way it has been distributed because it has not been effective in all IAI member countries. The editor explained that the decision to send packages to be distributed by some country representatives was done mainly due to cost savings considerations, however, the editor has heard from several people that the distribution is not done rapidly in some countries.

Recommendation: Based on this concern the CTF recommended that IAI requests to country representatives the mailing list of the newsletter recipients in their countries and that from now on the distribution should be done by the editor directly in order to expedite the distribution and given the fact that there are some resources available resulting from the savings in the publications of the newsletter. Regarding the number of copies to be printed, one week before sending it to the printers, the editor will ask the Directorate for an estimate of the number of copies needed according to events planned in that trimester.

Conflict of Interest & Standards of Ethical Conduct document: MOS distributed to the members of the CTF the IAI official document published for public distribution. The CTF recommended to include in the publication a reference number and to distribute to the members of the EC and CoP personally at their next meeting in July 2001.

IAI Website: MOS reported to the group that she and Luis Marcelo Achite, DIS manager, are working on the development of a new IAI homepage. The communications officer explained that the objective is to modernize the website, make it more attractive, condensed and easier to use. The cost of the new website would be between US\$ 250-300,00 for the graphic design (very low for this kind of service) and an estimate of US\$ 1000-1500,00 for the text edition. Vivi Hriscu, the English revision editor of the IAI annual report was approached by IAI to work with MOS in the re-writing of the website content. The communications officer hopes to have the new website operational by mid-July to be presented to the Conference of the Parties.

The members of the CTF group looked at the first new website draft design and suggested that graph designers visit other institutions' websites as comparative models, such as: APN, CLIVAR, IGBP, START.

CE suggested that IAI documents available on the website should be in acrobat (read format only) to avoid other people to download and modify them. Other members of the CTF said that many of them use the documents from the web as working documents and having them available as word documents was useful. Also, MOS explained that only IAI country representatives, SAC members,

members of EC working groups and/or PIs are informed about IAI's password to access IAI working documents on the website.

Annual Report: BG discussed with the group the problem of the delays in publishing the IAI annual report and that we should try to work very hard to produce future reports on time. MOS explained that the outline and initial content plan for the 1999-2000 annual report was defined in early 2000 identifying potential themes and invited authors. The schedule of activities based on this outline and initial content, including deadline for submission, revision, editing, translation, design and publication was defined with the goal of publishing the report by November/December 2000 (a few months after the period covered each year July (previous year)-June (current year)). The problem has been, again, to receive articles from invited authors and from members of the IAI Directorate. Not much can be advanced with many pieces of the report missing (editing, translation, layout of inside report, etc), which further delays the final stages of the publication process. Many communications have been sent to invited authors and to members of the IAI Directorate (Science, Director, Program and Financial/Administrative divisions) requesting that material be submitted in due time. Nevertheless, the communications officer received the last articles for the 1999-2000 in April 2001, which caused the delay of publishing the report.

The IAI Director explained that the delay was caused because of several reasons and in particular to the problems the IAI faced in the administrative/financial and accounting division, which he had to give priority to and the financial statements and external auditors' report, which was officially sent to IAI in April 2001. He agreed with the concern expressed by all members of the CTF about the need to issue the publication on time and will try his best to accomplish this goal for the next annual report.

The group discussed if it should make a recommendation to the Director to issue it on time, regardless of the content and including only information available at the submission deadline. The concern expressed by the Directorate was the consequences regarding the image of the IAI. The annual report is an institutional publication and should include all relevant information about the work and accomplishments of the IAI during a specific fiscal year. If the report does not include the institutional information (overview of activities, scientific and institutional development, etc) it will lose its purpose.

Recommendation: Once again, the Communications Task Force decided to make a strong recommendation to the IAI Director to give priority to the production of the annual report, support the communications officer in this work, and to request the cooperation of all members of the Directorate in this effort.

In addition, the communications officer presented to the group an outline for the 2000-2001 annual report. The group approved the theme suggested for the report— "IAI Vision Strategy: Science that Serves Society" and the content and identified potential invited authors. MOS also presented the tentative time schedule for the production of the annual report (please see below), with the ultimate goal of having it published by December 2001.

Tentative Timetable:

- Invitation to guest authors and members of IAI Directorate staff: May 18, 2001
- Submission of articles by invited guests and IAI Directorate staff: July 2, 2001
- English Editing Revision: July 2-August 10, 2001
- Spanish Translation: August 10-September 15, 2001

- Graphic Desing/layout: September-October 2001 (cover design definition)
November-December (text, pictures layout)
- Printers: November/December, 2001
- Distribution: December 2001

It is envisioned that the submission of the external auditors' letter and financial statement will be submitted to IAI in October/November 2001. If all other articles are submitted by July it is possible to advance on the revision and translation of the report. If other articles are delayed it will not be possible to follow the schedule above.

In order to accomplish this goal, the communications officer must receive all articles by invited authors and members of the IAI staff by no later than July 2nd, 2001. MOS informed the CTF that she would be out of the office for 4-5 months starting in mid-September 2001 (maternity leave), but she would make a strong effort and sacrifice to work on the report in November 2001 (for a couple of hours only from home) just to include the financial statement and external auditors' letter and finish up the last details of the report. If the work required from September to December implies more than a couple hours a day, she would not be able to do it, given her maternity leave.

It was clear then that if all material is not submitted by July 2nd, 2001 the communications officer will not be able to publish the annual report by December 2001 and it would be delayed until 2002.

Other Materials: the group discussed briefly the need for other materials. One idea suggested was the possibility of producing a CD , which could include a lot of IAI information such as scientific articles, institutional information, as well as some marketing and advertisement for IAI. PF informed the CTF that NOAA has produced a very good CD and he would ask John Kermond, from NOAA, about an idea of price for a three minutes CD and will report back to the CTF at its next meeting.

Marketing Strategy: the group discussed the need to develop a long-term marketing strategy for the IAI and the mechanisms necessary to implement it. The CTF recommended the development of an integrated marketing strategy of two phases: 1) Development of a Diagnosis of Current Situation; 2) Development of an Integrated Communication Strategy (based on the results of the diagnosis).

Bases para el establecimiento de la estrategia de comunicaciones del IAI

El objetivo de establecer una estrategia de las comunicaciones para el IAI, que responda a la misión dada:

“Desarrollar la capacidad para comprender el impacto integrado de los cambios globales presentes y futuros en el medio ambiente regional y continental de las Américas, y estimular la investigación cooperativa y la acción informada a todos los niveles”

Para lograr tener una estrategia, se hace necesario realizar un **Diagnóstico sobre la situación actual del IAI y un Programa integral de comunicaciones.**

I. Diagnóstico sobre la situación actual del IAI que permita evaluar el IAI respecto a como a logrado :

- Su reconocimiento

- Afirmar su imagen y prestigio en Las Américas y el Mundo.
- Proveer un entendimiento del impacto del Cambio Global
- Promover la colaboración en las investigaciones
- Promover acciones para informar a los tomadores de decisiones.

Para realizar este diagnóstico se hace necesario un estudio exploratorio, para lo cual se establece:

- a) **Público destino (anexo 1).**
- b) **Variables con sus respectivos indicadores por público destino (anexo 2).**
- c) **Instrumentos por público destino (anexo 3).**
- d) **Reponsabilidad de realización del Diagnóstico (anexo 4)**
- e) **Cronograma (anexo 4)**

II. Programa Integral de Comunicación

Este documento toma de base la misión y la visión del IAI, y contendrá:

1. Objetivos estratégicos:

- ◆ Comunicativos
- ◆ Organizativos

2. **Objetivos específicos por cada público destinos, a partir de cada eje temático, como argumento del objetivo específico.**
3. **Medios de comunicación, lo que incluye no sólo los que son del IAI, si no otros medios que puedan ser utilizados por la organización.**
4. **Mecanismos organizativos internos**
5. **Mecanismos de organización hacia el exterior de la organización**
6. **Plan de acción.**

Este trabajo para la elaboración del programa de comunicación, se acometerá en una fase dos, una vez analizado el diagnóstico.

ANEXO 1
PÚBLICO DESTINO

Público destino	Segmentación principal del público destino	Sub segmentación del público destino	Fuente de la Información
A. Científicos	1. Comunidad Científica del IAI	- Investigadores principales de proyectos (total 73) - Co Investigadores principales de los proyectos (total 386). - Personal preparado en cursos de capacitación y becas (total . - Participantes de otras actividades (talleres, seminarios, etc) - Miembros actuales y pretéritos de Consejo Científico Asesor (SAC), (total - Evaluable, panelistas de los diferentes anuncios del IAI (total . - Científicos con propuestas de proyectos u otras actividades no aceptadas por el IAI (total .	IAI
	2. Comunidad Científica no vinculada al IAI	- en países miembros - en países no miembros del IAI	- Sub grupos electrónicos de varias organizaciones científicas nacionales, regionales e internacionales EJ: IGBP (PF), AAAS (PF), AGU (PF), AMS (PF), Comisiones del Cambio Global de los países (Representantes), otras organizaciones recomendadas por el SAC. - Personas que reciben la revista IAI (Directorado), no incluidos en la comunidad Científica del IAI
B. Tomadores de decisión	1. Vinculados con el IAI (Ministerio o secretaria designada por el país)	Máximo nivel	contacto no puede ser por grupo electrónico, debe ser individualizado, a través del representante, lo cual lo solicitará el Director del IAI.

		• Nivel Intermedio (asesores, oficinas de colaboración internacional)	• Director IAI , solicitará información a los representantes
		• Representantes y alternos	• IAI
	2. No vinculados con el IAI	• Direcciones de Cooperación Internacional (Ministerios de MA, CyT, Energía, Transporte, Agua, Agricultura, Educación, Salud, Relaciones Exteriores, Turismos)	• El representante nacional a través de repuesta dada al Director IAI.
		• Organizaciones Nacionales y Continentales	• Director IAI , solicitará información a los representantes • IAI
		• Universidades	• Director IAI , solicitará información a los representantes • IAI
C. ONGs Fundamentalmente ambientalistas	1. Nacionales		• Director IAI , solicitará información a los representantes
	2. Internacionales		• Cuba en base del Banco de datos de la ONU
D. Organizaciones Científicas	1. Nacionales	EUA (AGU, AMS)	• Director IAI , solicitará información a los representantes
	2. Internacionales	IGBP, IHDP, START, ICSU, ONU(OMM, FAO, PNUD, PNUMA), WCRP, IRI	• Cuba por Sitios web
E. Donantes	1. Nacionales e Internacionales		• Miembro CTF Paul Filmer entregará información, de acuerdo a las informaciones del Grupo de Trabajo del IAI de búsqueda de fondos.

ANEXO 2
VARIABLES E INDICADORES*

Bases para los indicadores	Público destino
1. Conocimiento del Cambio Global Ambiental	todos
2. Conocimiento institucional del IAI (agenda científica, opinión sobre la estructura del IAI, misión, acuerdos, servicios de datos, países miembros, entre otras).	todos
3. Conocimiento de las actividades del IAI (programas, talleres, cursos, publicaciones, becas, etc)	todos
4. Conocimiento de los mecanismos de difusión del IAI (revista, web site, list servi, informe annual, DIS, otros materiales informativos)	todos
5. Juicios sobre las oportunidades, actividades, productos del IAI	A,E
6. Opinión sobre los representantes nacionales de cada país miembro	A
7. Opinión sobre el SAC, y el Directorado	A, B
8. Opinión sobre el proceso de selección en los anuncios de oportunidad	A,B,D,E
9. Relación Investigador principal con el representante nacional	A, B
10. Conocimiento de los resultados de los programas del IAI (listado lo entregará la Dirección IAI)	todos
11. Que producto, conocimiento, actividad necesita del IAI en el futuro	todos
12. Evaluación del apoyo recibido a diferentes tipos de actividad	A,B,D
13. Sentido de pertenencia al IAI	A1, B1
14. Oportunidades de trabajo o cooperación con organizaciones y organismos gubernamentales y no gubernamentales (listado lo entregará la Dirección IAI)	B,C,D,E
15. Conocimiento de las inversiones realizadas por el IAI para investigaciones, capacitación, infraestructura (listado lo entregará la Dirección IAI)	A, B1, E
16. Confiabilidad del IAI (normas de conducta ética)	todos
17. Se ha notado la presencia del IAI en los siguientes eventos (listado lo entregará la Dirección IAI)	A, B, C, D
18. Conocimiento de las cooperaciones con organizaciones técnicas (listado lo entregará la Dirección IAI)	A,B, D

***Más que variables e indicadores, en el trabajo realizado por la CTF, se dan las bases para el establecimiento de estos a partir de algunas preguntas que deben medir CONDUCTAS, INFORMACIÓN, OPINIÓN, del público destino.**

ANEXO 3

Metodología y Procedimientos

Metodología: Fundamentalmente cuantitativa

Procedimiento:

Técnica a emplear: cuestionarios aplicados fundamentalmente por correo electrónico, anónimos y cerrados en los fundamental.

Instrumento: Encuestas adaptadas al público destino, dando cumplimiento a los variables e indicadores propuestos para el estudio. Debe elaborarse en dos idiomas (español e inglés). Se puede analizar la encuesta aplicada por la NOAA (Director IAI, solicitará a la NOAA). La encuesta también será convertida a un formulario electrónico para ser montado en un servidor web ligado al web principal del IAI (NSF vía UCAR).

Respuestas a las encuestas: Las respuestas serán enviadas por correo electrónico al IAI o recolectadas a través de la encuesta montada en el web site. Las informaciones recolectadas a través del web serán dirigidas a la Dirección del IAI, y los profesionales en Cuba responsables del Diagnóstico.

ANEXO 4

Reponsabilidad de realización del Diagnóstico y Cronograma

1) Reponsabilidad de realización del Diagnóstico

- **Elaboración de las encuestas:** Personal designado en Cuba
- **Envío de las encuestas:** Personal designado en Cuba, según anexo 1
- **Montar la encuesta en el web:** NSF vía UCAR
- **Recepción inicial de información:** Personal designado IAI y UCAR
- **Recepción final información:** Personal designado IAI y en Cuba
- **Tratamiento de la información recibida a través de las encuestas:** Personal designado en Cuba
- **Informe Final a la Dirección del IAI:** Personal designado en Cuba

2) Cronograma

Este cronograma es preliminar, y depende su cumplimiento, de la entrada de toda la información necesaria en tiempo y forma.

a) Elaboración instrumentos por público destino fecha: 30/06/01

- Revisión de los públicos destinos
- Elaboración de la variables e indicadores
- Consulta miembros CTF sobre variables e indicadores
- Elaboración de los cuestionarios
- Consulta miembros CTF sobre los cuestionarios
- Elaboración cuestionarios finales por público destino

b) Creación banco de datos con todos los email, por público destino fecha: 20/06/01

- Envío por el IAI de todo lo descrito en el anexo 1
- Búsqueda de la información disponible en INTERNET
- Envío por miembros de la CTF de lo descrito en anexo 1

c) Entrega de la información según anexos 1 y 2 Fecha 20/06/01

d) Elaboración de la versión electrónica de la encuesta para montaje en el web

Fecha: 10/07/01

e) Selección y envío de la encuesta fecha: 10/09/01

f) Cierre Encuesta (Fecha a criterio técnico)

g) Procesamiento de la información (un mes a partir fecha de cierre, en principio octubre)

h) Presentación informe final a la Dirección IAI (15 días posteriores al procesamiento)

i) Presentación al EC en Noviembre, 2001

Future meeting and site: the group recommended to hold the next meeting of the CTF before the meetings of the EC and CoP in Panama, another one before the EC meeting in Cuba, and a sub-sequent one around April 2002.

Meeting of the Communications Task Force (CTF)
May 16-17, 2001 São José dos Campos, Brazil

AGENDA

May 16, 2001

10:30 Opening: Welcome and charge to the Committee, *Bárbara Garea, chair*

Approval of the Agenda, *Bárbara Garea, chair*

Comments on the Report of the last meeting of the CTF, *Bárbara Garea, chair*

Development of a long-term Marketing strategy for the IAI, *Bárbara Garea, chair*

- Should we hire the services of a specialized marketing professional/firm?
- The Task Force should determine the major lines of the marketing strategy: what image we want to disseminate; what are the expected results; etc.

5:30 Adjourn

May 17, 2001

9:30 New Communication Materials

- Science Programs Publication, *Paul Filmer*
- New Brochure and Portfolio, *Marcella O. Schwarz*
- IAI/GEF/WMO project brochure, *Eduardo Banús*
- Conflict of Interest & Standards of Ethical Conduct Document, *Marcella O. Schwarz*

Update and Discussion of IAI Communication Mechanisms

- Newsletter, *Carlos Ereño*
- IAI Website (new project), *Marcella O. Schwarz and Luis Marcelo Achite*
- 1999-2000 and 2000-2001 Annual Reports, *Marcella O. Schwarz*

Others

- Communications Officer's leave of absence (as of mid-Sept. 2001)
- Other materials or ideas to be considered and discussed by the CTF

Communications Task Force, *Bárbara Garea, chair*

- Mandate
- Next meeting date and site

5:00 Adjourn