

# **THE JCTR *BASIC NEEDS BASKET*: APPRAISAL AND PROPOSAL FOR EFFECTIVE COMMUNICATION STRATEGY**

by

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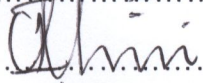
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## DECLARATION

I declare that this report has not been previously submitted for a degree in this or any other university.

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## ABSTRACT

This paper is based on a systematic effort to evaluate and analyse how the Jesuit Centre for Theological Reflection (JCTR) communicates to its target audience the *Basic Needs Basket* (BNB) information, a monthly price survey of basic essential food and non-food items needed by average sized households in Zambia. The assessment involving one hundred respondents was conducted in Luanshya, Livingstone and Lusaka, three of the six towns where BNB information is collected and disseminated. The evaluation endeavours to determine the target audience, dissemination process, awareness and usefulness of the JCTR BNB, and the overall effectiveness and/or efficiency of the existing communication strategy. Data was collected mainly through a semi-structured questionnaire and in-depth interviews with JCTR staff and sixteen JCTR strategic stakeholders. Multi-stage cluster sampling procedures were used to determine the sample size of respondents. The paper examines how BNB information, packaged primarily as a statistical publication and press statement, is disseminated to more than twelve cluster groups including trade unions, churches, government, media institutions and households. The assessment attempts to advance the dynamics of planning an effective communication strategy and provides insights about *grassroots mobilisation, instructional and participatory discussion themes or message designs*. The paper proposes a framework for assessing different levels involved in planning an effective communication strategy: *problem identification or communication objectives, target audience, message, medium, and feedback*. This framework illustrates that each communication campaign should be developed to reach specific audiences with tailored messages, materials and interventions, strategically designed to meet specific objectives. The conclusion presented in this paper is that a communication strategy must be *consistent* with the project or organisation's framework; *feasible*, in relation to the resources and the timeframe; and *effective*, that is, makes the best use of the available resources in order to achieve the set objectives.

In memory of my late father Sydney Peter Mwale

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# ABBREVIATIONS

AIDS	: Acquired Immune Deficiency Syndrome
BNB	: Basic Needs Basket
CFSC	: Centre For Social Concern
CSO	: Central Statistical Office
CSUZ	: Civil Servants Union of Zambia
FAO	: Food and Agricultural Organisation of the United Nations
FM	: Frequency Modulation
GRZ	: Government of the Republic of Zambia
HIV	: Human Immunodeficiency Virus
JCTR	: Jesuit Centre for Theological Reflection
JHC	: Jesuit Hakimani Centre
LCMS	: Living Conditions Monitoring Survey
NGOs	: Non-Governmental Organisations
SADC	: Southern African Development Community
SCRP	: Social Condition Research Project of the JCTR
TBN	: Trinity Broadcasting Network
UNDP	: United Nations Development Programme
UNZA	: University of Zambia
ZNBC	: Zambia National Broadcasting Corporation

# CHAPTER 1

## INTRODUCTION AND BACKGROUND

### 1.0 Introduction

This is an evaluation of how the Jesuit Centre for Theological Reflection (JCTR) communicates to its target audience (end-users) the *Basic Needs Basket* (BNB) information, a monthly price survey of basic essential food and non-food items (excluding other costs such as education and health fees, electricity and water tariffs and transport fares) needed by an average sized household in Zambia. It was conducted in Luanshya, Livingstone and Lusaka. The evaluation endeavours to determine the target audience, dissemination process, awareness and usefulness of the JCTR BNB, and further assess the overall *effectiveness and/or efficiency* of the communication strategy, and make *recommendations* on how best the JCTR BNB can be communicated and used to accomplish desired goals.

### 1.1 Profile of Jesuit Centre for Theological Reflection (JCTR)

The JCTR is a project of the Society of Jesus (Jesuit Order) in Zambia and Malawi founded in 1988 as a research, education and advocacy centre that promotes study and action on issues - linking Christian faith and social justice. It was established to examine the Zambian and Malawian social, economic, cultural and political situations from a theological perspective and to undertake appropriate research and action with a special concern for the poor. Most of the JCTR current activities are undertaken in Zambia. The Jesuit Order has a parish in Lilongwe but no centre operating with similar activities like the JCTR in Zambia.

The vision of the JCTR is “*a society that promotes justice in all spheres of life, especially for the poor*”. One of the ways in which the JCTR expresses its vision is by publishing monthly BNB data to give a *snapshot* of the socio-economic situation in select locations across Zambia. According to the JCTR, BNB information is an important *highlight* of the gap between the cost of living and the typical income of ordinary (lowly paid) households and is a *guide* for all households in deciding how best to budget to meet basic needs. BNB data is a useful information tool for various

groups, such as households, employers and employees, community groups, public and private sectors to advocate for change such as policy change and better wages.

Part of the mission of the JCTR is “*to foster from a faith-inspired perspective a critical understanding of current issues.... [and] generate activities [such as the BNB data collection] for the promotion of the fullness of human life through research, education, advocacy and consultation*”. In order to achieve some of the goals set out in its mission statement, the JCTR undertakes a price survey of prices of food and non-food items and uses this information as a tool for influencing policy direction as it relates to the cost of living.

Some of the values guiding the organisation’s activities, such as advocating and lobbying for policy change and better social service delivery, include:

- *human dignity*, respect for the basic equality and potential of every woman and man;
- *option for the poor*, criteria for evaluating all the organisation is and does, especial with regard to what difference this makes for the poor;
- *social justice*, passion for eradication of poverty and promotion of integral and sustainable development, with commitment to necessary structural changes in society;
- *critical analysis*, rigorous pursuit of truth in open and accountable fashion;
- *discernment*, prayerful reflection purpose, style, product, consequences of organisation and activities;
- *rootedness*, closeness to the lives of ordinary people and the most vulnerable and their joys and hopes, sorrows and anxieties; and
- *collaboration and participation*, working with others in a mutually responsible way, with team work essential on the staff.

These values guide the organisation’s engagement in advocacy and lobby efforts. The BNB statistical information is for the JCTR an entry-point into wider discussions around issues of social and economic development in Zambia and an aid for household budgeting.

JCTR currently has three main projects:

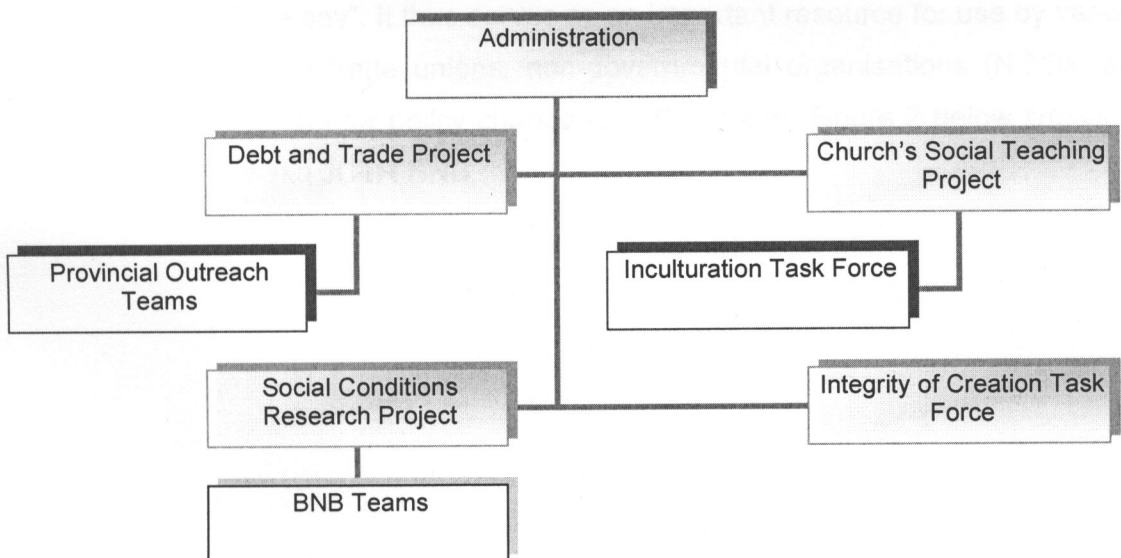
- i. **Church Social Teaching Project.** This project promotes the values of the Church for social justice as well as engages in promoting political

ethics and producing educational materials, e.g., social homilies, pamphlets, audio-visuals, and calendars.

- ii. **Debt and Trade Project.** This project focuses on ensuring that Zambia does not fall back into debt crisis and campaigns for trade justice both locally and internationally. The project has five provincial outreach teams in Kasama, Livingstone, Ndola, Monze and Mongu to coordinate its campaign activities.
- iii. **Social Conditions Research Project.** This project explores the living conditions of the people and carries out research on cost of living and other wider social capital topics such as education, health, and HIV and AIDS. The project has established BNB teams in Luanshya, Ndola, Kitwe, Livingstone and Kabwe where monthly surveys are conducted.

In addition to these three main projects, there are two Task Forces: (i) Inculturation, and (ii) Integrity of Creation (environment). Figure 1 shows the general structure of the JCTR. Administration provides organisational development support to the three main projects, outreach teams and two task forces.

**Figure 1.1: General Structure of JCTR**



**Source: Author design**

Through the Social Conditions Research Project (SCRIP), JCTR strives to advocate for changes in policies and/or practices that inhibit attainment of sustainable livelihoods. The Project has since 1991 been keenly monitoring the rising cost of living in a few selected towns in Zambia through a price survey of a “basket” of essential food and non-food items.

The essential food items include mealie meal, cooking oil, salt, vegetables and non-food items include charcoal, water, electricity, kerosene and housing. The JCTR BNB data is then compared to average take-home wages and general household incomes to evaluate how people are surviving.

The JCTR BNB is conducted to collect information on how the cost of living affects households in Zambia with a view to advocating for changes in the ordering of society and to promote a shift from less human conditions (e.g., violation of workers’ rights to just remuneration, pension and social security) to more favourable human conditions (e.g., just wages).

The JCTR BNB contains information for use by various categories of people from all walks of life. The BNB data highlights cost of basic food items for a family of six, cost of essential non-food items, totals from previous months, and some other additional costs (e.g., health, house rentals) and a section on comparative figures of wages or “take home pay”. It thus serves as an important resource for use by various stakeholders including trade unions, non-governmental organisations (NGOs) and households to advocate for policy change (JCTR, 2006a). Figure 2 below shows an example of the Lusaka JCTR BNB.

**Figure 1.2: The JCTR Basic Needs Basket, Lusaka (April 2007)**

**(A) COST OF BASIC FOOD ITEMS FOR A FAMILY OF SIX IN LUSAKA**

Commodity	Kwacha	Quantity	Total
Mealie meal (breakfast)	35,400	3 x 25 Kg bags	106,200
Beans	7,200	2 Kgs	14,400
Kapenta (Siavonga)	45,000	2 Kgs	90,000
Dry Fish	34,100	1 Kg	34,100
Meat (mixed cut)	15,400	4 Kgs	61,600
Eggs	5,600	2 Units	11,200
Vegetables (greens)	2,800	7.5 Kgs	21,000
Tomato	2,400	4 Kgs	9,600
Onion	2,100	4 Kgs	8,400
Milk (fresh)	8,000	1 x 2 litres	8,000
Cooking oil	15,100	2 x 2 litres	30,200
Bread	2,400	1 loaf/day	72,000
Sugar	4,500	8 Kgs	36,000
Salt	1,900	1 Kg	1,900
Tea (leaves)	10,000	1 x 500 g	10,000
<b>Sub-total</b>			<b>K514,600</b>

**(B) COST OF ESSENTIAL NON-FOOD ITEMS**

Charcoal	52,500	2 x 90 Kg bags	105,000
Soap (Lifebuoy)	1,300	10 tablets	13,000
Wash soap (Boom)	2,600	4 x 400 g	10,400
Jelly (e.g., Vaseline)	6,200	1 x 500 ml	6,200
Electricity (medium density)	113,000		113,000
Water & Sanitation (med - fixed)	88,500		88,500
Housing (medium density)	700,000		700,000
<b>Sub-total</b>			<b>K1,036,100</b>

**Total for Basic Needs Basket**

**K1,550,700**

Totals from past months	Apr 06	May 06	Jun 06	July 06	Aug 06	Sep 06	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07	Mar 07
Amount	1,408,700	1,421,850	1,379,650	1,376,300	1,421,650	1,450,250	1,422,950	1,436,400	1,442,350	1,541,050	1,543,650	1,560,050

**(C) SOME OTHER ADDITIONAL COSTS**

Item	Kwacha	Item	Kwacha
Education		Transport (bus fare round trip):	
Grades 8-9 (User+PTA/year)	K250,000 – K270,000	Chilenje-Town	K4,800
Grades 10-12 (User+PTA/year)	K300,000 – K410,000	Chelston-Town	K5,400
School Uniform (grades 8-12)	K70,000 – K180,000	Matero-Town	K4,200
Health (clinic)		Fuel (cost at the pump)	
3 Month Scheme (per person)	K5,000	Petrol (per litre)	K6,469
No Scheme Emergency Fee	K5,500	Diesel (per litre)	K5,539
Mosquito Net (private)	K15,000 – K20,000	Paraffin (per litre)	K4,304

**(D) SOME COMPARATIVE FIGURES OF WAGES --"TAKE HOME PAY"**

	Teacher	Nurse	Guard with Security Firm	Secretary in Civil Service	Average Monthly Income in Urban Low-Cost Area - CSO	Pieceworker on a Farm
Pay Slip	K672,000 to K1,193,000	K748,000 to K2,105,000	K250,000 to K750,000	K653,000 to K1,190,000	645,326 (between October 2004 and January 2005)	K3,000 to K15,000 per day

Source: JCTR website: [www.jctr.org.zm](http://www.jctr.org.zm)

## 1.2 Background

Zambia has an estimated population of 10.9 million people, with 61 percent of the population living in rural areas and 39 percent in urban areas (CSO, 2005). An urban area, as defined by the Central Statistical Office *Living Conditions Monitoring Survey (LCMS) Report 2002-2003*, is based on two criteria: (1) *size* of an area with a minimum *population* of 5,000 people; and (2) *economic activity* is non-agricultural. The area must in addition have basic facilities such as piped water, tarmac roads, post office, police post and a health centre (CSO, 2004).

Zambia has 72 main towns most of which are located along the line of rail, stretching from Livingstone in the south to Chililabombwe on the Copperbelt in the north. Administratively, Zambia is divided into nine provinces: Southern, Eastern, Northern, North-Western, Luapula, Lusaka, Central, Copperbelt and Western provinces. Today, Zambia is one of the poorest nations in the world, classified as a least developed country by the United Nations Development Programme (UNDP). The UNDP *Human Development Index* in the 2005 *Human Development Report* placed Zambia at 165 out of 177 countries (UNDP, 2006). This annual report presents a picture of what is happening to people in terms of life expectancy, adult literacy and access to resources needed for a decent standard of living.

Life expectancy is estimated at 37.4 years compared to 42 years at the time of independence (1964) and 54 years at the end of the 1980s. Adult literacy (% of ages 15 and older) is at 68 percent (UNDP, 2006). According to the *LCMS Report 2004* of CSO, 68 percent of the population is poor and 53 percent is extremely poor. In this report, the group frequently referred to as *extremely poor* or *ultra poor* in the literature of poverty is a category of people or households “who cannot afford to meet the basic minimum food requirements even if they allocated all their total spending on food” (112). There are more poor people in rural areas than in urban areas, at 78 percent and 53 percent respectively (CSO, 2005).

## 1.3 Context of the JCTR *Basic Needs Basket*

The context in which the JCTR BNB was established is grounded in the JCTR mission statement of fostering, from a faith-inspired perspective, a critical understanding of current issues. Guided by the Church’s social teaching that



emphasises human dignity in community, the JCTR activities include the monthly BNB that measures the cost of living, to promote the fullness of human life.

By using the BNB, the JCTR strives to present the current prices of food and non-food items in a simplified manner. This helps to bring all macro-economic policy discussions down to a household level. The JCTR BNB is also a useful tool in empowering and instilling a sense of vigilance in people to start reflecting about issues affecting their life so that consequently they can begin to appeal and engage in discussion with policymakers for improved and/or better formulation of policies.

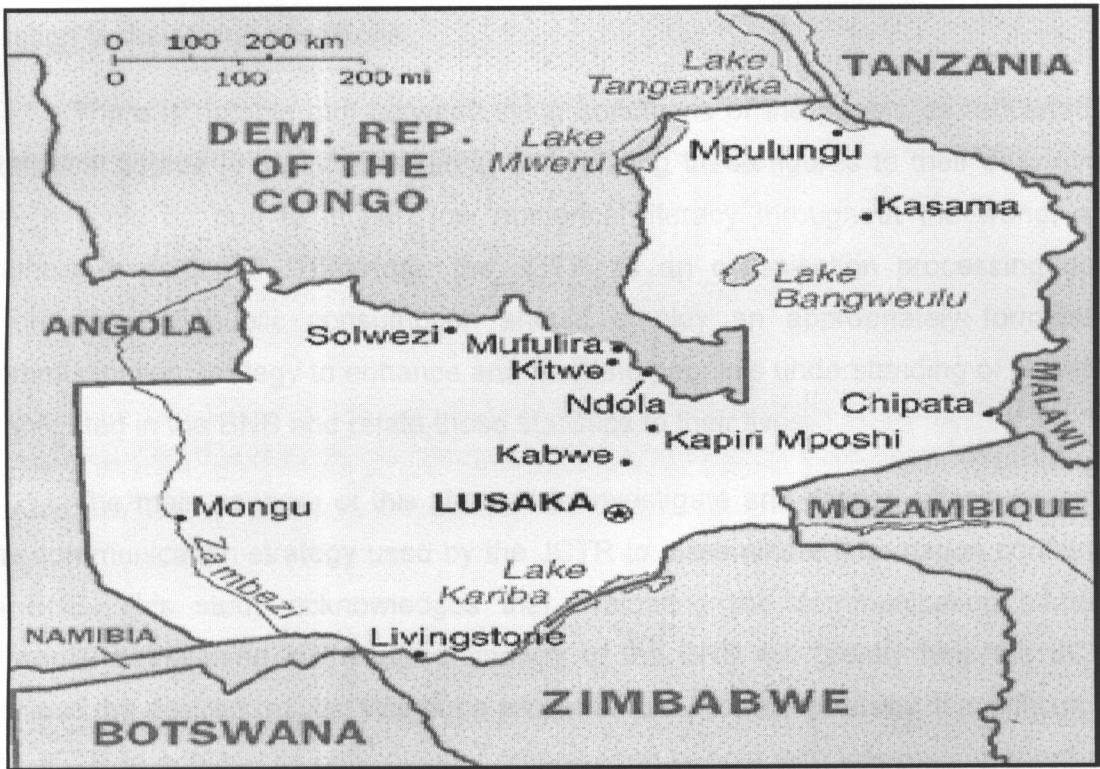
The JCTR BNB has been carried out primarily for two reasons. First, to help the JCTR and other stakeholders “remain connected to the present living situations of the people, to understand the reasons for changes in prices from month-to-month and to respond accordingly to immediate conditions in the country”. Second, to help the JCTR and other stakeholders “analyse how the cost of living varies over *intervals of time* to understand the reasons for trends in price changes over seasons or years and to make recommendations for policy-changes over *seasons or years* and to create a socio-economic climate that allows people to afford a decent standard of living” (JCTR, 2005,3).

The first Lusaka “Food Basket” report was compiled in March of 1991. Since then, its methodology and format has evolved and expanded. Data is now collected in Lusaka and five other urban towns in Zambia, Luanshya, Kabwe, Kitwe, Ndola and Livingstone. This expansion was a response to the 2003 *Impact Assessment Study* which observed the narrow geographical scope of the BNB and recommended collection of data for the JCTR BNB in other urban towns (JCTR, 2005). One of the factors that were considered in the selection of these towns included expanding to urban areas with similar socio-economic situation like Lusaka and located mostly along the line of rail.

In 2006, the JCTR started collecting BNB data on pilot from Kasama and Mongu, including data for rural BNB initiative from Matushi (Mufumbwe), Saka (Masaiti) and Malama (Mfuwe) as part of its continued efforts of raising structural issues affecting the rural community (e.g., deplorable infrastructure development, and food security problems). The rationale was to get a picture from three different rural areas: (i) predominantly agriculture, Matushi; (ii) an area close to one of the

towns were urban BNB is being collected for future comparison with an urban BNB, Saka; and (iii) a wild life management area, Malama. Figure 1.3 below shows Map of Zambia with some locations including pilot places where the JCTR BNB information is currently being undertaken.

**Figure 1.3: Map of Zambia**



Source: [www.appliedlanguage.com/.../map\\_of\\_zambia.shtml](http://www.appliedlanguage.com/.../map_of_zambia.shtml) [Accessed 15 May 2007]

Over the years, the JCTR BNB has continuously incorporated new dimensions in terms of its final presentation of the collected monthly increases and/or decreases in food and non-food items. One communication tool the JCTR is using is a *press release* commenting on the present issues affecting the cost of living and proposing any immediate actions that the government, international organisations, employers or other groups should undertake in order to improve living standards of their employees and society as a whole (JCTR, 2006b).

## **1.4 Statement of the Problem**

Knowledge and information are essential for people to respond successfully to the opportunities and challenges of social, political, cultural and economic changes. But to be useful, this knowledge and information must be effectively communicated to the people. With regard to the JCTR BNB, the question that is often asked is whether ordinary people understand or are able to interpret statistical figures in relation to their living conditions.

There is notable gap between living conditions of the people as tabulated in statistical figures (e.g., inflation rates) and relating these figures to their daily lives, which could be due to in part low numerical literacy throughout the world, and Zambia in particular. Therefore, the JCTR as an organisation processing such information for public consumption should employ an appropriately formulated communication strategy to enhance and facilitate people's understanding of statistics highlighted in the BNB and relate those statistics to their lives.

The main concern of this study is to investigate and assess effectiveness of the communication strategy used by the JCTR to disseminate information contained in BNB. This study acknowledges that evaluating the communication strategy currently being used in the dissemination of the BNB will greatly help the JCTR achieve the desired results. Without a proper communication strategy, it is difficult for the JCTR to achieve its objectives of empowering people with information about the cost of basic needs. The study is also aimed at proposing some more effective ways of influencing people and enabling them to identify, analyse and challenge existing policies that affect their lives.

## **1.5 Rationale**

The study intends to benefit the organisation to design and implement communication strategy that is in line with its mission of advancing from a faith-inspired perspective a better, critical understanding of current issues in a more simplified manner. The study will contribute to greater understanding of different communication strategies. It will further generate debate and contribute to the existing communication strategy used by the JCTR with regard to dissemination of the BNB. In a situation such as Zambia where numerical literacy levels are so low,

the JCTR BNB could enhance people's understanding (or lack thereof) issues affecting their daily lives.

## **1.6 Objectives**

The main objective of this study is to *evaluate* the existing communication strategy of the JCTR BNB and to *propose* ways to make the communication strategy more effective.

### **1.6.1 Research Objectives**

In order to achieve the intended overall objective, this study endeavours to address the following specific objectives:

- i. establish what current communication strategy the JCTR uses in the dissemination of the BNB;
- ii. assess public *awareness* of the JCTR BNB in selected urban areas where it is carried out;
- iii. find out whether or not the JCTR BNB is used by households or stakeholders (e.g., trade unions, NGOs) and in what ways;
- iv. assess the overall *effectiveness and/or efficiency* of the JCTR BNB communication strategy; and
- v. make *suggestions* and *recommendations* on how best the JCTR BNB can better be communicated and used to strengthen its desired results.

## **CHAPTER 2**

### **METHODOLOGY**

#### **2.0 Introduction**

This chapter looks at the research methodology used in this evaluation. This study was conducted in three urban areas out of the six urban areas where the JCTR BNB is collected and disseminated monthly; namely, Luanshya, Lusaka and Livingstone. Primary data was collected through a semi-structured questionnaire and in-depth interviews. The questionnaire was administered to 100 respondents in the three select towns and in-depth interviews were conducted with field researchers, focal persons and JCTR staff.

A multi-stage cluster sampling was used to determine the sample size of respondents and places where the assessment was conducted. Secondary data was collected mainly through literature review of issues related to basic needs, communication strategy designs and media theories. The Statistical Package for Social Sciences (SPSS) was used for entry and analysis of primary data.

#### **2.1 Research Questions**

In each town, the following research questions were the basis of this study.

- i. What is the target audience of the JCTR BNB?
- ii. What means/channels does the JCTR use to disseminate the JCTR BNB?
- iii. How effective are these communication strategies?
- iv. How could these strategies be improved?
- v. How is the JCTR BNB used and by whom?
- vi. What is the nature and extent of public awareness of the JCTR BNB?

The study thus endeavours to determine the target audience, dissemination process, awareness and usefulness of the JCTR BNB.

## 2.2 Target Audience

The study targeted 100 respondents among the end-users of the JCTR BNB in Luanshya, Lusaka and Livingstone. Data from these respondents was collected through a semi-structured questionnaire. The questionnaire was used for collecting both quantitative and qualitative data. The questionnaire, among others, explored how the respondents came to know about the JCTR BNB, use and/or not use of the JCTR BNB, difficulties encountered in accessing the JCTR BNB, and further solicited for specific suggestions for improving the dissemination of the JCTR BNB.

Moreover, in-depth interviews with JCTR staff and review of existing BNB literature were used to investigate the communication strategy currently being used and why -- with comparative advantage on efficiency and effectiveness. In-depth interviews were conducted with four JCTR staff (director, coordinator, research officer and project officer of the Social Conditions Research Project) in Lusaka, and with two field researchers and four focal persons of Luanshya and Livingstone.

In Lusaka, a semi-structured questionnaire was administered to ten key strategic stakeholders of the JCTR randomly selected from twelve cluster groups: trade unions, international organisations, government, donors, churches, non-governmental organisations, embassies, tertiary and research institutes, media houses, private sector, profession bodies and interested individuals. This approach provided information in identifying the main goal of conducting the monthly JCTR BNB, reviewing the dissemination process, practical difficulties encountered in accessing and use of the JCTR BNB information and further explored how these difficulties could be overcome.

Of the two kinds of research observation, that is, participant observation and direct observation, this study used more the participant observation. This accorded the researcher an opportunity to conduct a snapshot assessment of the different communication tactics used by the JCTR in the dissemination of the BNB. The researcher was attached to the Social Conditions Research Project for three months, and participated in BNB related activities in November 2006, February and March 2007. Notably, in November 2006, the student participated in the annual planning meeting in Lusaka (which brought together 10 field researchers) and participated in a

media luncheon in March of 2007, which brought together various media institutions based in Lusaka.

The researcher undertook four visits each to Luanshya and Livingstone for purposes of visiting different locations, visited retail outlets and markets where BNB information is collected and had interviews with municipal and city council planning officials respectively. The researcher had in-depth interviews with field researchers and focal persons, and trained three translators competent in Tonga (Livingstone), Bemba (Luanshya) and Nyanja (Lusaka) to help him in administering the questionnaire.

### 2.3 Sampling Procedures

The study made use of a multi-stage cluster sampling. **First**, in determining the number of respondents to be interviewed, the research considered the population of each town, represented by “n”; divided by the population of all the three towns, represented by “m”; multiplied by the expected number of respondents to be interviewed, represented by “y”. As illustrated in the following equation:

$$\frac{n}{m} \times y, \text{ where “y” is equal to 100 targeted respondents}$$

Population figures for this exercise depended on the CSO 2000 *Census of Population and Housing*. According to CSO (2000), Luanshya has a population of 147,908; Livingstone has a population of 103,288; and Lusaka has a population of 1,084,703. Therefore, the expected number of respondents for each town was calculated as follows:

$$\text{Luanshya: } \frac{147,908}{1,335,899} \times 100 = 11 \text{ Questionnaires}$$

$$\text{Livingstone: } \frac{103,288}{1,335,899} \times 100 = 8 \text{ Questionnaires}$$

$$\text{Lusaka: } \frac{1,084,703}{1,335,899} \times 100 = 81 \text{ Questionnaires}$$

Similarly, the methodology that was used in the administration of the questionnaires in each town was the multi-stage cluster sampling. For purposes of distribution of 100 questionnaires, three stages were involved.

Stage one, involved dividing each town into three geographical categories: low density area, medium density area and high density area. In this study, low density area approximates what is generally known as high cost area, medium density approximates what is generally known as medium cost area and high density area approximates what is generally known as low cost area.

Moreover, in arriving at how many questionnaires were to be administered in a particular area, the following formula was used:

$$\frac{x}{v} \times q = z ,$$

where “x” represented the number of areas classified as high, low, medium; “v” represented the total number of areas classified as high, low, medium (Cfr. Appendix III); “q” as the number of questionnaires assigned for each location; and “z” represented the number of questionnaires to be administered in a particular area.

At stage two, in each classified location (high, medium, low), a simple random sampling was used. At stage three, in each location the head of the household or a proxy was the target of the interview. The head of the household is understood as a person “all members of the household regard as the head and who normally makes day-to-day decisions concerning the running of the household” (LCMS Report 2004, CSO, 7). Below is a summary of how the 100 questionnaires were distributed.

### Luanshya

Distribution of questionnaires to 11 households was calculated as follows:

$$\text{High: } \frac{6}{14} \times 11 = 5; \text{ Medium: } \frac{4}{14} \times 11 = 3; \text{ Low: } \frac{4}{14} \times 11 = 3$$

Three places were randomly selected from the list of 14 locations (Cfr. Appendix III)

**Table 2.1: Allocation of questionnaires to 11 households in Luanshya**

Low		Medium		High	
Mine area	3	Roan township	3	Ndeke township	5
Total	3		3		5

### Livingstone

Distribution of questionnaires to 8 households was calculated as follows:



$$\text{High: } \frac{9}{20} \times 8 = 4; \text{ Medium: } \frac{6}{20} \times 8 = 2; \text{ Low: } \frac{5}{20} \times 8 = 2$$

Three places were randomly selected from a list of 20 locations (Cfr. Appendix III)

**Table 2.2: Allocation of questionnaires to 8 households in Livingstone**

Low		Medium		High	
Highlands	2	Malamba	2	Dambwa Site and Service	4
<b>Total</b>	<b>2</b>		<b>2</b>		<b>4</b>

## Lusaka

Distribution of questionnaires to 81 households was calculated as follows:

$$\text{High: } \frac{28}{65} \times 81 = 35; \text{ Medium: } \frac{20}{65} \times 81 = 25; \text{ Low: } \frac{17}{65} \times 81 = 21$$

Nine places were randomly selected from the list of 65 locations (Cfr. Appendix III)

**Table 2.3: Allocation of questionnaires to 81 households in Lusaka**

Low		Medium		High	
Leopards Hill	7	Cheystone	8	George Compound	12
Fairview	7	Kaunda Square Stage 2	8	John Laing	12
Rhodes Park	7	Villa Elizabettha	9	Old Chawama	11
<b>Total</b>	<b>21</b>		<b>25</b>		<b>35</b>

The research involved a cross-section of households. Demographical characteristics of households included sex, age-groups, marital status, household size, educational background, employment status and income category (Cfr. Appendix VI).

**Second**, in the selection of the two field researchers to be interviewed, a purposive sampling was used. These were interviewed because of the nature of the collaboration they have with the JCTR. That is, their involvement in the dissemination and collection of monthly data for the JCTR BNB.

**Third**, a simple random sampling was used in the selection of three out of six focal persons already identified in Livingstone and Luanshya. The six focal persons represent key strategic groups, which the JCTR has already identified, including NGOs, the Church, private sector, trade unions and the government. Similarly, in the selection of ten key strategic groups in Lusaka, a simple random sampling was done from several groups available on the JCTR BNB e-mail list (Cfr. Appendix IV).

Moreover, in-depth interviews were conducted with the Director of the JCTR, the Coordinator of Social Conditions Research Project and two project officers. These were interviewed because of the nature of their work in the production and dissemination of the JCTR BNB to provide the researcher with any other issues that required further clarification.

## **2.4 Data Collection**

Data collection was done mainly through a semi-structured questionnaire, in-depth interviews (through use of interview guides) and participatory observation. In-depth interviews and questionnaires were also used to measure public awareness and/or use of the JCTR BNB.

## **2.5 Data Analysis**

The Statistical Package for Social Sciences (SPSS) software was used for the entry and further analysis of data that was gathered from respondents in Luanshya, Livingstone and Lusaka, including JCTR field researchers, focal persons and key strategic groups.

## **2.6 Limitations of the Study**

This research was limited by a number of factors including:

**2.6.1 *Language barriers:*** the lack of translation of the questionnaire into the languages (Tonga, Bemba and Nyanja) spoken by respondents in the three towns created some difficulties that were likely to affect the results. In order to overcome this obstacle, a local person was identified and trained to assist in the collection of data in a language suitable for that particular area. That is, in Livingstone (Tonga) and Luanshya (Bemba) one translator was engaged and in Lusaka (Nyanja) two translators were engaged.

**2.6.2 *Resource constraints:*** due to resource constraints, the sample size was limited to a hundred respondents for all the three towns. In addition, not all the five field researchers and all the six identified focal persons were interviewed in Luanshya and Livingstone. From a total number of six towns where the urban JCTR BNB is conducted only three towns were chosen as representative of others. Sample sizes for Luanshya and Livingstone were

much smaller. But a bigger sample size could have yielded more valuable insights into the evaluation.

2.6.3 *Timeframe:* The JCTR BNB communication strategy for Luanshya and Livingstone has not been going on for a long time, two years at most. However, the questionnaire was designed to offer information for a good analysis of the current communication strategy's shortcomings, challenges and opportunities. It further aimed at obtaining useful feedback from the end-users of the JCTR BNB in informing the evaluation on the existing communication strategy.

## CHAPTER 3

### CONCEPTUAL AND THEORETICAL FRAMEWORK

#### 3.0 Introduction

This chapter looks at the different concepts and theories that this study takes into consideration. These concepts and theories have been used to examine and determine how the subject matter should be perceived and what aspects need to be emphasised.

#### 3.1 Concepts

The following definitions apply whenever any of the following terms are used:

**Advocacy** is an approach that seeks to generate support of policymakers or decision-makers, both within and outside the community. This approach intends to create a conducive environment that leads to a policy sensitive to the issues in question (Mefalopulos et Kamlongera, 2004).

**Basic Needs** (or the basic needs assessment) is an approach that measures welfare based on certain basic needs such as food, clothing, education and medical treatment. In view of the fact that minimum basic needs do not only entail food-energy intake, other minimum basic non-food items like housing and transport are necessary components of a *food basket*, *bread basket* or *basic needs basket*. Specialists like nutritionists generally predetermine acceptable levels of each of these elements (CSO, 2005).

**Basic Needs Basket** will refer to the JCTR BNB, which is a monthly price survey of the cost of essential food and non-food items comprising the minimum basket of goods needed for an urban household of six in Zambia.

**Communication** is a process of sending information from one source or one entity to another either through verbal means, writings, images or symbols in order to solicit for the receiver's thoughts, response or actions.

**Communication Strategy** is a well-planned series of actions aimed at achieving certain objectives or change through the use of communication methods, techniques and approaches (Mefalopulos et Kamlongera, 2004).

**Household** refers to a group of persons who normally live together and make common provision for basic food and non-food items, though they may not be related by blood. A household may comprise several members and in some cases may have only one member.

**Mass Communication** refers to the process of creating and sending of a homogeneous message (e.g., the JCTR BNB) to a large heterogeneous audience either through an electronic medium (e.g., radio and television) or print medium (e.g., newspaper and magazine).

**Means** are vehicles necessary for conveying the JCTR BNB. These means refer to channels of communication in use and/or not in use for the dissemination of the JCTR BNB.

**Policy** is a guiding principle designed to influence decisions and actions designating a required process or procedure within an organisation. A policy here refers to government policy (either local or central government) that has a direct impact on the lives of people (e.g., an employment policy relating to worker's conditions of service).

**Target Group or Audience** refers to a specified audience or demographic group in an already defined geographical area for which the JCTR BNB message is designed. In this report it refers to end-users or recipients of the JCTR BNB in Luanshya, Livingstone and Lusaka.

### 3.2 Theories

The role communication plays in advancing social change is constantly appreciated by institutions in society including non-governmental organisations. Many of these organisations have demonstrated that communication can be a very powerful tool to use in addressing social concerns and problems. This is why an organisation such as the JCTR trying to promote critical thinking in public policy has

a growing interest in engaging in more effective communication strategies to reach their intended audience effectively. Some of the theories related to this study include:

**Interpersonal communication** is an interaction process between people either face-to-face or through mediated forms and feedback is immediate. In the case of the JCTR this kind of communication occurs, for example, when field researchers and focal persons disseminate the JCTR BNB during public meetings, workshops and discussions and also when JCTR staff gives out the BNB publications and/or gives presentations on living conditions.

**Small group communication** is a communication of people involving 3-12 gathered as a group to discuss the same issue affecting their community. This is evidently shown in the focal groups found in Luanshya and Livingstone where six local groups participate in raising issues affecting their respective areas arising from the monthly JCTR BNB of that particular town.

**Social change campaign** is a deliberate effort by one group, referred to as the change agent, who designs a programme that is intended to persuade other people to accept, modify attitudes, practices and behaviour (McGuire, 1989). Any effective social change campaign always takes into consideration local knowledge, that is, local techniques and practices already developed in those communities where a new programme is to be introduced. However, this study identifies JCTR as a change agent that, for example, has initiated through its monthly BNB a campaign to persuade on one hand policymakers and employers to increase employees wages; and on the other hand to empower the public and employees to engage in dialogue with policymakers or employers in wage negotiations.

### **3.2.1 Media Theories**

In its BNB advocacy efforts, the JCTR has often used the media as a vehicle or channel to influence public policy formulation, implementation and evaluation. It is therefore vital to discuss what is known about how the media affect individuals and groups. This study is primarily informed by two theories: *agenda-setting* and *framing*. These media theories appear to be the most relevant for this evaluation.

**Agenda-setting** is a process of placing issues on the policy agenda for public consideration and intervention, a process dominated by the news media (McCombs

et Shaw, 1972). Some researchers view the policy agenda as an outcome of media influence on the public. As James Dearing and Everett Rogers (1996) observes, the media set the public agenda which, in turn, sets the policymaker agenda. Agenda-setting is thus defined as “an ongoing competition among issue proponents to gain the attention of media professionals, the public, and policy elites” (Dearing et Rogers, 3). The implications for these relationships demonstrate that news media have the ability to place a high priority on issues that are in fact not as important as others.

Public opinion research over the years confirms that news media constitute the main source of many people’s information about public affairs (Gilliam et Bales, 2004). Hence, “The real world is increasingly viewed through the lens of the news media. As issues rise and fall on the media agenda, so does their potential for attracting the attention of the public and policymakers. The ability of the news media to set the public agenda determines to a larger extent what issues policymakers will feel compelled to address. Indeed, media are often read by policymakers as proxy for public opinion” (Gillian et Bales, 2004, 4). The media is capable of creating a particular image about issues that the public should be paying attention to. As Bernard Cohen observed that even though the media may not be successful most of the time in telling people what to think, it is strongly successful in telling people what to think about (McQuail, 2005).

Agenda-setting theory is very relevant in policy change campaigns. It is a useful technique that is able to direct and influence policymakers in adopting particular policy alternatives. This theory could also be used to strengthen advocacy efforts such as getting more organisations to support a particular course of action or policy recommendation (e.g., feeding programmes in basic schools). Agenda-setting could contribute to alliance building and raising awareness around a particular issue.

**Framing** refers to the way a story is told, its selective use of symbols, metaphors and messengers and to the way these cues, in turn, trigger the shared and durable cultural models that people use to make sense of their world (Tannen, 1993). As Charlotte Ryan observes, “Every frame defines the issue, explains who is responsible, and suggests potential solutions. All of these are conveyed by images, stereotypes, or anecdotes” (Ryan, 1991).

The way the media frame or present public issues is therefore critical to “how people think and interpret ideas and issues, particularly how they think about solutions to the problem” (Gilliam et Bales, 2004, 13). News media do more than tell us what to think about, they also direct how we think about particular social issues (McCombs, 1972) whether, for example, we consider those issues to be individual problems necessitating better behaviours or whether they are collective, social problems requiring structural policy solutions (Gilliam et Bales, 2004).

Therefore, not only can framing affect whether the solution to any given social problem is judged by public to be individual or collective, but the media’s use of specific frame is an important influence on the way people judge the relevance and legitimacy of a communication’s implicit or explicit call to action. Understanding which frame elements serve to advance which policy options with which groups is central to communications strategy. The JCTR BNB press releases is one such technique that could make use of media framing to demonstrate whether a particular issue should be perceived as individual or public problem.

The two media theories -- *agenda-setting* and *framing* -- are not mutually exclusive in practice. They can be employed in the same communications campaign for different purposes and with varying degrees of emphasis. Both theories apply to this study.



## CHAPTER 4

### LITERATURE REVIEW

#### 4.0 Introduction

This chapter examines existing literature on basic needs basket assessments and discusses communications campaign practices that organisations advocating for social change have employed to disseminate information about those surveys.

#### 4.1 *Basic Needs Basket Campaigns*

The concept of basic needs approach to development emerged in the mid 1970s. This concept was motivated largely by the scepticism of some economists who questioned the standard yardstick for measuring economic growth that only reflected the Gross Domestic Product (GDP) or the Gross National Product (GNP) having no corresponding effects on the lives of the people (UNDP, 1991).

Different scholars, such as economists, sociologists and nutritionists, have mostly used the concept of basic needs as an indicator to measure poverty (Bapstite, undated). In recent years, however, with the introduction of social welfare reforms and renewed interest in the “working poor”, policy analysts and advocates for the poor have developed what are called “basic family budgets”. These budgets attempt to measure the amount of income families require to meet their basic needs. Consequently, these budgets have been useful tools in a number of policy debates surrounding welfare reforms, including the living or just wage and to address in many ways the inadequacies of the official poverty thresholds as measures of well-being (Bernstein et al., 2000).

Erik Thorbecke and Germano Mwabu in *Research Contribution of the First Phase of African Economic Research Consortium Poverty Project* (2006) note that two methods are used to derive the poverty line (i) the food energy intake (FEI) method and (ii) the cost of basic needs (CBN) method. The CBN approach has the advantage of ensuring consistency (treating individuals with the same living standards equally), while the FEI approach has the advantage of specificity by reflecting better the actual food consumption behaviour of individuals around the caloric threshold given their preferences and the relative prices of food (Thorbecke et

Mwabu, 2006). The need to have a credible measure of poverty has been embarked on by national planning authorities as well as civil society groups in several countries in the World, including Canada, Malawi, Kenya and Zambia.

The federal government in Canada in 2003 initiated a *Market Basket Measure* (MBM) project towards a development of a genuine and credible measure of poverty. The focus of the MBM was on the actual costs of living with a general emphasis on necessary commodities. As Chris Sarlo observes in his article “Concerns About the Market Basket Measure”, “the ‘basket’ is not entirely a market basket, but a mix of two things – actual items whose costs are based on prices that people pay, and estimates based on what people spend” (Sarlo, 2003, 31).

In Malawi, the Centre For Social Concern (CFSC) since 2004 has been collecting data on the cost of living using the basic needs basket showing what is needed for a family of six in and around Lilongwe city (CFSC, 2004). The cost of basic needs is also undertaken to assess the poverty situation in Kenya by the Jesuit Hakimani Centre (JHC). The first ever food basket was conducted in 2004 to estimate the average expenditure of frequently consumed food and non-food items in Nairobi’s informal settlements that are nutritionally adequate to survive. The Centre currently distributes the *Basic Needs Basket* to the government for policy consideration (e.g., poverty reduction policy) and to residents in and around Nairobi city (JHC, 2005). The two centers, CFSC and JHC, began their surveys after undertaking feasibility studies at the JCTR.

In Zambia, institutions involved in basic needs assessment include JCTR and government departments like CSO and Bank of Zambia. The basic needs survey undertaken by these institutions assess livelihoods of the poor and “vulnerable” or most affected groups (e.g., widows, orphans and destitute families) in Zambia. Data is collected to monitor the cost of basic foods in urban and rural areas reflecting current prices of food and non-food items that contribute to the household basic food basket.

Of particular interest to the subject matter is the CSO, a department under the Ministry of Finance and National Planning. It is mandated to collect information on various statistical data (in the economic, social, agricultural and environmental areas including a monthly food basket) that is used for planning purposes. Such

information is used for various purposes including policy formulation, planning, implementation, monitoring and evaluation of government programmes and projects (CSO, 2007).

Overall, the basic needs approach is seen as a “credible measure of poverty [*relating to basic materials and social needs*] that helps to determine the extent of the problem and whether [*government*] policies are having any positive impact” (my italics), (Sarlo, 2003, 32). Whether basic needs baskets, cost of foods, or basic family budgets, these measures use a market-based approach that tries to achieve two things. First, they identify the budget items necessary for a family to live a decent standard of living. Second, they determine how much it costs to provide for each item at an adequate level (Bernstein et al., 2000).

Previous studies on the JCTR BNB have fed into the “wider” policies of improving the welfare of the people, especially the poor. The assessment, inter alia, observed the narrow geographical scope of the BNB and the widespread awareness of BNB by policymakers ranging from government officials to employees of international organisations, trade unions, various civil society organisations and academic researchers as an indicator of poverty (JCTR, 2006a). The present study however assesses how the JCTR is currently disseminating its monthly BNB in order to yield intended results including policy change.

It is important therefore to examine the different communication campaigns organisations utilise to effectively influence policy changes in society. Communications campaign is used here in its broadest sense as intentional efforts that use paid media, as well as other techniques, to advance a particular perspective on a social issue (Gilliam et Bales, 2004). These “efforts” are not always known as campaigns stand alone entities and highly formal efforts, but are perceived as organised set of communications activities that are embedded within, or complementary to, a larger set of work designed to achieve a common end (Coffman, 2003).

## **4.2 Communication Campaigns**

In recent years, scholars are increasingly making a distinction between at least two main types of communication campaigns according to their primary

purpose (or locus of change) or what the campaign is ultimately trying to achieve: (i) *individual behaviour change*, or (ii) *policy change* campaigns (Coffman, 2003; Gilliam et Balles, 2004). *Individual behaviour change campaigns* try to decrease in individuals the behaviours that lead to social problems or promote behaviours that lead to improved individual or social well-being. *Policy change campaigns* attempt to mobilise public and decision maker for policy support or change (Coffman, 2003). The latter's main goal is to get people to understand an issue in a certain way and express themselves to policymakers and to convince policymakers to act on the public's interest (Gilliam et Balles, 2004).

Media advocacy assumes a prominent position as it is common to many communications efforts working toward policy change. It is a strategic use of media to advance a social or public policy initiative. Activities central to media advocacy include: (i) elaborating policy options that are supported, (ii) identifying the policymakers with power over decision-making on those options, (iii) identifying the audiences that can be organised to put pressure on policymakers, and (iv) targeting the audiences with messages in support of the policy options (Coffman, 2003).

### **4.3 Communication Strategy Design**

In designing a communication strategy, a number of approaches could be used to achieve set objectives. A communication approach is defined here as a way of using communication techniques, methods and media to address issues in the most effective way (Mefalopulos et Kamlongera, 2004). This study adopts the Food and Agricultural Organisation (FAO) three communication approaches useful in designing a communication strategy: (i) participatory discussion themes or message design, (ii) instructional design and (iii) group mobilisation. Selecting communication approaches is a very crucial stage in communication strategy design since this is the time communication intervention starts. Some of the questions asked at this initial stage include: which channels and media are going to be used; what information is going to be considered; and which materials are going to be produced?

#### **4.3.1 Participatory Discussion Themes and Message Design**

*Participatory discussion themes design* and *message design* are concerned with identifying critical topics, elaborating relevant information and passing certain

contents, either in a one-way manner or through a two-way dialogue mode. This is done in order to address a situation which needs to be improved. The message to be passed on should be identified and dealt with, with the community or a select group. Preferably, the organisation and the community should discuss the content, appeals, the type of media and the way to present them.

On one hand, this differs with messages design in that its aim is not to pass a definite message but rather to create the basis for discussing a critical issue. Picture codes and cloth flipcharts are often used for this purpose. On the other hand, participatory discussion themes design aims to develop communication materials designed to debate certain topics by having community open and become aware of certain issues, such as exploring its advantages and disadvantages. In designing participatory discussion themes and message design, key aspects to be considered follow the following sequence: assessment of the focal problems, defining the communication objectives, reviewing the profile of priority interaction groups, and selecting the communication techniques (e.g., information, advocacy, persuasion and promotion) most suitable for the organisation's strategy.

Message designs are usually concerned with passing information and knowledge necessary for the interaction groups to address and solve the problem. Posters, brochures, radio, video, booklets can be useful for the transmission of the intended message. Messages, even when designed in a participatory manner, remain a one-way communication instrument. Conversely, discussion themes are concerned more with bringing up issues to be openly discussed rather than providing definite answers or passing specific information. They are usually effective in dealing with raising awareness and highlighting attitudes. Illustrated flipcharts and picture codes are some of the communication materials frequently used for this purpose.

Some of the communication techniques relevant to this study include *promotion* and *advocacy*. *Promotion* is informing to make people aware and familiar, or even accept ideas, concepts or behaviour. By promotion an organisation tries to create interest or a favourable impression of an idea or practice through motivation, image creation and/or positioning. *Advocacy* is seeking to generate support of decision-makers, both within and outside the community. Such an approach is usually adopted to create a conducive environment that may lead to a policy that is

sensitive to the critical issues in question. It can be directed either at NGOs, government ministries or international donors. It aims at influencing the development policy, obtaining financial support and legitimisation. An advocacy approach can be used not only in a bottom-up mode but also in a horizontal way in order to facilitate or set a favourable environment, for instance, from NGOs' to policymakers or from the latter to decision makers (Mefalopulos et Kamlongera, 2004).

#### **4.3.2 Instructional Design**

*Instructional design* is particularly useful for providing knowledge and skills needed to use new techniques or adopt innovations. Not all desired changes can be induced by messages. Some situations require a more interpersonal intervention. The scope of instructional design is that of providing part of the community, or selected interaction groups, with certain skills or knowledge necessary to address a problem (Coffman, 2003). This approach makes use of training and education techniques (Mefalopulos et Kamlongera, 2004).

*Education* is about increasing knowledge, comprehension and/or change of attitudes, usually through a formal learning environment. Education approaches can be carried out at an interpersonal individual level (e.g., teacher-student situations), at a group level (e.g., meetings, specific gatherings and schools) or at a mass level (e.g., publications, radio and television). *Training* involves imparting or increasing skills and gives opportunity for trial. This approach is similar to education, but it focuses on practical skills rather than theoretical knowledge. It usually implies an interpersonal learning environment in venues such as workshops or demonstration sites in the hope that people will adopt or adapt the new idea after trial.

By using training or education approaches people have the opportunity of becoming familiar with the complex issues and the opportunity of acquiring knowledge and skills for improving their situation. Education and training are also effective approaches in addressing changes of attitudes. Such training could entail, for example, training of trainers or training some members of the community as part of the campaign team to provide skills about a particular issue beneficial to everybody. An organisation may actually find it appropriate to adopt a combination of approaches. Instructional design requires that the organisation designing learning instructions need to achieve the communication objectives in an effective way and

indicating the expected outputs (e.g., two training workshops, ten trade unionists trained).

#### **4.3.3 Group Mobilisation Design**

*Group mobilisation* is a way of organising people in groups around specific issues and/or objectives. The purpose of group mobilisation is to strengthen the possibilities for successful action, through the uniting of many people with different backgrounds but with similar objectives. Some of the approaches used include: community mobilisation, partnership or networking and group formation.

*Networking/partnership* attempts to have different groups or associations, within or from outside the community join and work together to address more effectively specific issues or problems. This is an important approach because a single group or association may not have all the resources for tackling a certain community problem. Therefore, it may be necessary to network with other organisations for help and for the intervention to carry more weight thereby facilitating the achievement of the common objective.

*Group formation* consists of encouraging and facilitating the formation of groups of people, usually within the community, having a specific set of tasks aimed at addressing a specific issue. Groups can be formed to deal more effectively with a certain problem, to share labour required by a complex activity, to provide moral support and legitimise social and technological change, to facilitate the duplication of certain knowledge or practices in the community. Groups are usually advised, for example, to form a management committee, carry out a number of tasks such as calling meetings and prepare the agenda, report about actions taken, promote decision-making and follow up the implementation of the activities. This approach uses communication to facilitate mutual trust and understanding among people sharing a common interest or need.

*Community mobilisation* is a systematic effort to involve the community in actively taking part in the resolution of a specific development issue, through communication means and methods. This approach aims at bringing together all the community in order to work together to achieve something beneficial for all.

These different approaches (networking, group formation and community mobilisation) are used to organise the community, or part of it, in order to address the main problem facing the community or group more effectively. Sometimes, for the same purpose, the community may decide to work towards a common objective with outside entities, taken on board as partners.

#### **4.4 Conclusion**

In sum, then, the difference in a campaign's primary purpose (individual change or policy change) is a critical factor in decisions about how a communication campaign is designed (Coffman, 2003). Therefore, determining a campaign's purpose (or objectives) and target audience is important because it affects the success of a communication campaign. Moreover, the three communication approaches (participatory discussion themes/message design, instructional design and group mobilisation design) provide a direction to follow in the use of different techniques and media. They also provide a purpose for using them (i.e. to promote, to inform, to educate, to form groups, etc.). In order to select an appropriate approach an organisation should consider, among others, the project framework, and most importantly, its communication objectives. These provide the basis for the content and themes to be developed in order to select the most effective and appropriate approaches for a particular situation.



## CHAPTER 5

### THE JCTR *BASIC NEEDS BASKET* COMMUNICATION STRATEGY

#### 5.0 Introduction

This chapter examines the current communication strategy the JCTR is using in disseminating its monthly BNB information. It therefore examines how this is being done.

#### 5.1 JCTR *Basic Needs Basket* Information Flow

The Social Conditions Research Project (SCRP) of the JCTR, on one hand, is in charge of ensuring that BNB data is collected from Lusaka, Luanshya, Livingstone, Kabwe, Kitwe and Ndola. On the other hand, the project disseminates the information to relevant authorities either government or private institutions for appropriate action, such as wage increment or policy change. Hence, it engages in both advocacy and lobby strategies in raising issues from the BNB information requiring public and/or policymakers' attention. SCRCP has devised a *Collection Template* for recording prices of same brand names (e.g., Breakfast mealie meal, and Lifebuoy soap) from identified retail outlets and total amounts of other additional items like health fees, electricity and water tariffs to ensure uniformity across all BNB towns (Cfr. Appendix V).

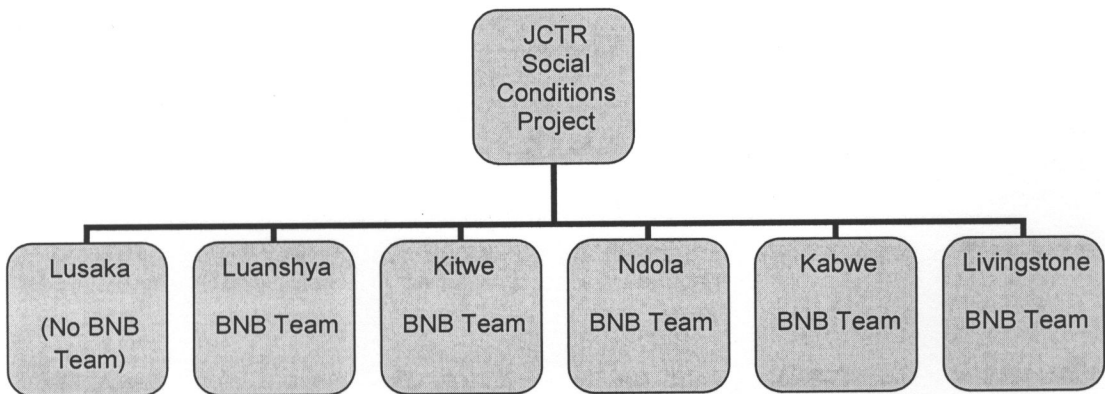
According to the *Guidelines for Urban Basic Needs Basket Data Collection* (2007), field researchers collect monthly BNB data from at minimum five outlets between 25<sup>th</sup> and 27<sup>th</sup> and submit by the 28<sup>th</sup> of each month to SCRCP complete *Collection Template* attached with one-page comments on data (explaining any qualitative information relating to price variations learned from marketeers and traders) and socio-economic situation of that particular town. All brands and quantities within the essential food and non-food items are reviewed on a quarterly basis (January, April, July and October) for variation in market preference or product availability. Similarly, electricity, housing, water and health fees are updated quarterly. The cost of education is adjusted annually and transport fares (for three-round trips) are reviewed as and when changes occur.

The calculation of the average cost of the BNB is done by the SCRP. Every month 150 copies of the computed BNB information is mailed (by postal mail) to field researchers within three working days following receipt of all the data. Field researchers have a responsibility to distribute the monthly BNB within their respective towns to focal persons representing identified key strategic stakeholders like trade unions, government and the public. Currently there are five field researchers collaborating with the SCRP in Luanshya, Livingstone, Kitwe, Kabwe and Ndola. In Lusaka, BNB data collection, computation and dissemination is mainly done by SCRP staff.

Moreover, field researchers are required to organise quarterly focal group meetings and undertake other related BNB advocacy efforts such as conducting research on wages, organise radio programmes on BNB information and also record information and stories of impact in a *Records Book*. This, at present, is one of the formal ways the JCTR is obtaining some feedback from recipients of BNB information. The field researcher and six focal persons make up a BNB team in each particular town: Luanshya, Livingstone, Kabwe, Ndola and Kitwe.

These six focal persons are interested individuals from NGOs, government, private sector, churches, trade unions and resident community groups. These groups were identified as interested parties after a consultative (stakeholders') meeting conducted by the SCRP in all the five towns in order to involve more local community groups to participate. Figure 4 below illustrates how the BNB information flows from the SCRP to the five select urban BNB teams in Zambia.

**Figure 5.1: JCTR *Basic Needs Basket* Dissemination Web**



### 5.1.1 BNB Information Packaging

The BNB information is packaged primarily in two ways: BNB Statistical Publication (known as the JCTR *Basic Needs Basket*) and a *Press Release*. First, a *BNB Statistical Publication* is data computed on one-page format showing average costs of prices of food and non-food items, additional information such as health and education fees, local bus fares, cost of fuel, comparative figures of wages or “take-home-pay” (e.g., monthly salary of secretary in the civil service and hospital nurse) and totals of BNB from previous months (See Sample on page 5 of this paper).

Second, a *Press Release* is prepared to accompany the monthly *BNB Statistical Publication* commenting on variations in prices (increases or decreases) and making recommendations for policy change. A press release also gives summaries of cost of basic needs of all the six urban towns where BNB data is collected. It is also tied to relevant pressing issues of the day such as the need to incorporate economic, social and cultural rights in the new Zambian Constitution. (See Box 1 for a Sample of BNB Press Release). Other secondary forms of BNB information packaging include: reports and policy analysis.

**JCTR BASIC NEEDS BASKET RECORDS K4,650 INCREASE IN COST OF BASIC FOOD**

The cost of food for a family of six in Lusaka has increased by K4,650 to K514,600 for the month of April from K509,950 recorded in the month of March. This is according to the *Basic Needs Basket* survey conducted every month by the Jesuit Centre for Theological Reflection (JCTR) to estimate cost of food and essential non-food item.

As much as the “collective” cost of food items shows this increase of K4,650, the price behaviour of individual items was mixed. For example, where as increases were recorded in – 25kg bag of breakfast meal (up by K500), 1kg Kapenta (up by K700), 1kg meat (up by K200), a unit of eggs (up by K400), 2 litres of cooking oil (up by K500) and 500g tea leaves (up by K1,100) – there were reductions in food items such as dry fish (1kg down by K1,400), tomato (1kg down by K200) and onion (1kg down K400).

For essential non-food items, minor increases were recorded in both wash and bath soap (up by K100), and Jelly -- vaseline increased by K600. Charcoal, packed in a 90Kg bag, recorded a substantial reduction (K8,000) from costing K60,500 in March to costing K52,500 in April.

One important thing to note regarding this situation of prices is the *seasonality* and *policy* dimensions in offering explanation. For example, the reduction in the price of fish is associated with government’s lifting of the fish ban and the reduction in the price of charcoal is associated with the beginning of a time of easy production and transportation.

For the above reason, the JCTR conducts the monthly *Basic Needs Basket* not as a mere statistical exercise but to understand the dynamism of living conditions seen through cost of living. In capturing prices of food and non-food essential items, the *Basic Needs Basket* helps in understanding fluctuations of intense and mild difficult economic situations experienced by households and therefore shading light on the kind of strategies or policy responses to design.

In order to further understanding of living conditions of the people, the JCTR links the *Basic Needs Basket* in *quantitative* figures and the actual *qualitative* living conditions of the people through monthly interviews with select households in high density areas. During March for example, this work showed that the largest source of expenditure in many households was on food, followed by non-food items and then expenditure on health. The fact that households spend much of their incomes in meeting their immediate needs implies that they are unable to save and therefore cannot invest in areas designed to secure their lives (e.g., make capital, education investments, etc).

Even more critically, the qualitative interviews not only reveal on *what* the income is spent but also *how* that income is spent. The interviews established that most of the households in the high density areas rely upon candles and small packs of charcoal for energy, buying approximately 2 to 4 candles per day (K500 each) and 2 small plastics of charcoal (K1,000 each) which works out to be much higher in cost than buying in larger quantities such as estimated by the *Basic Needs Basket*. For example, purchased in small quantities, on average the cost of energy for a household without electricity totals approximately K3,000 to K4,000 per day, or K90,000 to K120,000 per month.

But it is the resilience and creativity with which most of the Zambian people have in responding to the challenge of high cost of living that needs to be encouraged by way of policy responses or strategies. These responses or strategies must include “quality” formal employment creation and access to credit arrangements that lead to establishing economic activities that go beyond just meeting household consumption needs.

**Source: JCTR website: [www.jctr.org.zm](http://www.jctr.org.zm)**

### 5.1.2 BNB Information Dissemination and Target Audience

The SCRP in 2006 published BNB brochures to raise awareness among the seven target groups: community groups, NGOs, employers, government, households, church groups and trade unions. These brochures designed with specific messages for each of the groups encourages them to make use of the BNB information as a tool for action.

The SCRP duplicates copies of *BNB Statistical Publication* every month for dissemination in all the six towns. About 500 copies are prepared for Lusaka dissemination, and 150 town-specific BNB copies are sent to field researchers in Luanshya, Ndola, Kitwe, Livingstone and Kabwe. Of the 500 Lusaka BNB copies, 200 are sent to Parliament and the remaining 300 are passed out at public meetings and workshops by JCTR staff to interested individuals and organisations.

This is preceded by a *Press Release* that is sent to media institutions both print and electronic. However, SCRP currently is not buying space in either print or electronic media to publish the full copy of its press release and/or BNB Statistical Publication even though both copies are sent to media organisations by fax and e-mail. A press release is among the regular feature in Commerce Gazette, a corporate magazine published every other month by Creative Group Limited of Lusaka. So far, the two information packages (in full) are not being published in the widely circulated newspapers such as The Post or Times of Zambia. The BNB Statistical Publication was once published in The Challenge Magazine and Commerce Gazette. It is published quarterly in the JCTR *Bulletin*. Moreover, every month excerpts of the press release have been quoted in several print media including The Post, Times of Zambia, Zambia Daily Mail and National Mirror and have been aired as news stories by radio Phoenix, Yatsani radio, Hot FM radio, ZNBC television and Muvi television stations.

Even though all the six towns use the same guidelines and methodology, there are differences in the way the Lusaka BNB information and BNB information from other five towns is being disseminated. The next section discusses how Luanshya and Livingstone BNB information (with similar BNB team structures) and Lusaka BNB information (without a BNB team) is being disseminated monthly.

### **5.1.2.1 Lusaka BNB**

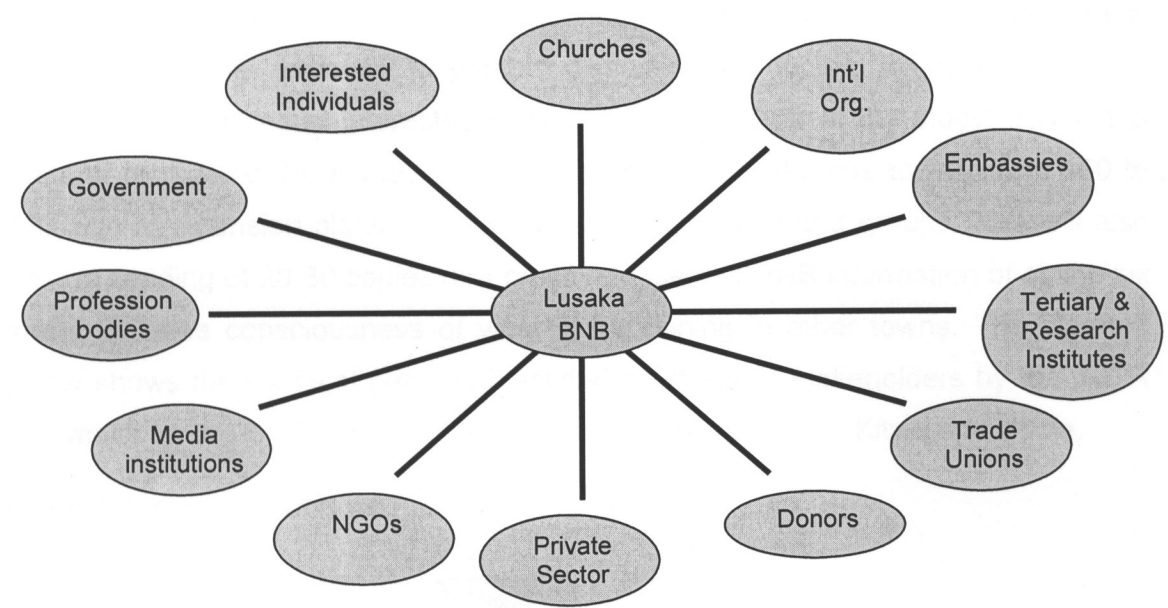
There are many ways in which the Lusaka BNB information is sent to its target audience. These include: (i) press release (to print and electronic media); (ii) JCTR *Bulletin* and other publications, e.g., Commerce Gazette; (iii) presentations at various public fora, such as workshops; (iv) through field researchers and focal persons in five urban areas; (v) BNB copies are sent to government institutions like Parliament (for all Members of Parliament), and international organisations such as UNDP; and (vi) passed out in places like markets and schools.

Dissemination of the BNB information in Lusaka happens at various levels. First, a press release, accompanying a monthly Lusaka BNB Statistical Publication, is prepared and sent by e-mail and fax to Lusaka based print and electronic media. The information is sent to both public and private media institutions.

Second, both the press statement and the Lusaka BNB Statistical Publication are sent by e-mail to interested individuals and organisations within and outside Lusaka. Third, the press statement and Lusaka BNB publication are posted on the JCTR website. Fourth, a set of copies (a press statement and BNB data of all the six towns) are sent to Parliament every month. Fifth, other copies are given out to people passing-by the JCTR office.

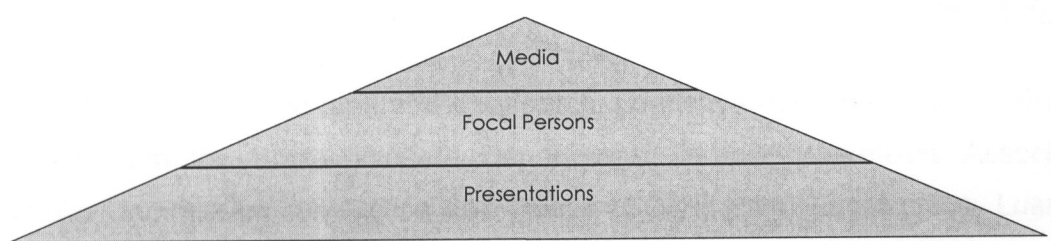
The press statement and BNB information of all the six towns are sent by e-mail to individuals and groups within and outside Lusaka belonging to one of the following cluster groups: NGOs, churches, international organisations, private sector, trade unions, tertiary and research institutes, government, media houses, embassies, donors, profession bodies and interested individuals as shown in figure 5 below.

**Figure 5.2: Lusaka BNB Information Target Audience**



In order to reach all its intended end-users within Lusaka and other towns in Zambia, the JCTR is using the following means (vehicles): (i) the media (press release); (ii) focal persons; and (iii) presentations at various public meetings organised by the JCTR or by other organisations. JCTR uses the media mostly as a vehicle to advocate and lobby for policy change. Figure 5.3 shows the three main means the JCTR is currently using to disseminate the Lusaka BNB information. These same channels are also used to disseminate BNB information of other five towns by the SCRP to the general public.

**Figure 5.3: Means used to disseminate BNB Information**

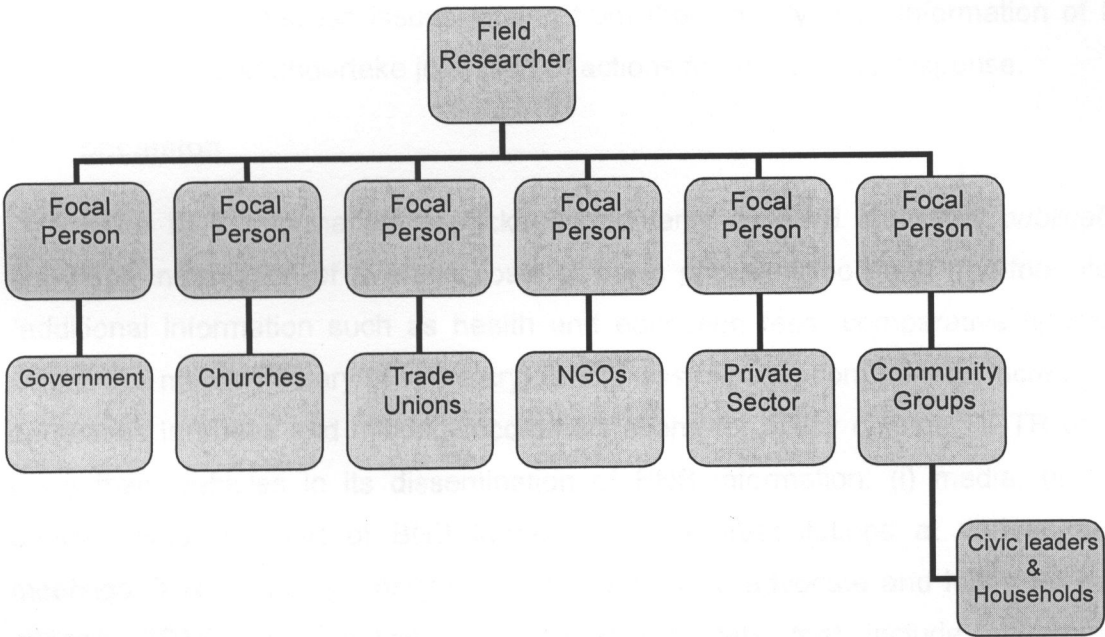


**5.1.2.2 Luanshya and Livingstone BNB**

The Luanshya BNB information and Livingstone BNB information are sent to field researchers for dissemination to interested groups in these particular towns.

Every month, (i) 150 copies (town-specific BNB Statistical Publication) are sent to the field researcher in Luanshya and Livingstone for dissemination among focal persons, and (ii) each focal person disseminates copies to their respective organisations and other interested individuals. At the time of the study, JCTR had plans of increasing the number of copies sent to each of these towns, from 150 to 250, due to extension plans in terms of catchment areas and groups. This will also include sending of 20-30 copies of a press release and BNB information of all the six towns, to raise consciousness of what is happening in other towns. The diagram below shows the six focal persons identified as strategic stakeholders by the JCTR who make up the BNB team in Luanshya, Livingstone, Kabwe, Kitwe and Ndola.

Figure 5.4: Structure of BNB Team

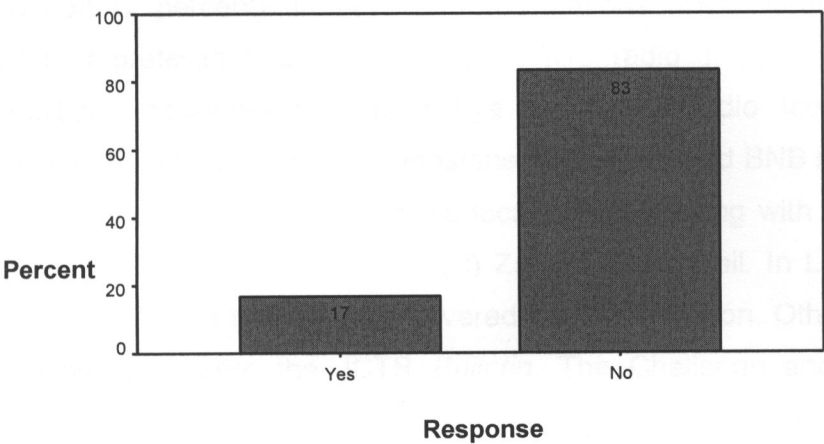


In addition, at the time of the research, Luanshya BNB team had seven focal persons from the Social Welfare Department, Zambia Marketeers Association, Catholic Commission for Justice and Peace (CCJP) Paral Legal office, Luanshya Business Association, Happy Children, Disability Association of Zambia and Luanshya Copper Mine union (Interview with Elmeda Chungu, April 2007). Livingstone BNB team consisted of six focal persons from Zambia Congress of Trade Union (ZCTU), Young Women Christian Association (YWCA), Councillor, Salvation Army, Resident Development Committee (RDC), and Former Employers



respondents were not aware. When those aware were asked when they first heard about it, 41 percent of the respondents said less than six months ago and 59 percent of the respondents learnt about it is more than a year ago.

**Figure 6.1: Percentage of Respondents Awareness of JCTR BNB Information**



The research also revealed that the levels of awareness were lower in Lusaka at 12 percent and Luanshya at 38 percent than Livingstone at 50 percent. In order to assess the depth of public knowledge about the JCTR BNB information, respondents were asked to state what they knew. Those who said they were aware of the JCTR BNB but could not explain exactly what it is or its content accounted for 41 percent, while 36 percent said BNB data is about people’s income in relation to their expenditure on food and non-food items and 23 percent of the respondents said it related food prices with people’s expenditure. Assessing public awareness of BNB information gives a picture of their depth of understanding of what it is and consequently how to use it.

**6.1.1.2 How respondents came to know about JCTR BNB**

Respondents came to know about the BNB information through various channels of communication including radio, television and newspapers. In particular, 24 percent of the respondents came to know about the JCTR BNB through the radio while 12 percent each accounted for those who knew about BNB information (i) through a friend, (ii) heard on television, (iii) JCTR focal person, (iv) BNB brochure,

and (v) read in the newspaper; and the remaining 16 percent while attending a workshop, seminar and public discussion.

Respondents were further asked to mention a specific radio, television, newspaper or magazine where they first saw BNB information. With regard to television, the most cited television station by respondents was ZNBC (53 percent) and Muvi television (7 percent). In Lusaka, radio stations which were identified include: in order of preference Q-FM, Phoenix, ZNBC radio 1, 2, 4, Hone and Yatsani. In addition, respondents in Luanshya mentioned radio Icengelo. No respondent mentioned a radio station in Livingstone having covered BNB information news. In terms of newspapers, in all the three locations, beginning with most cited were (i) The Post, (ii) Times of Zambia and (iii) Zambia Daily Mail. In Livingstone, Southern Times was cited as having once covered BNB information. Other sources of BNB information cited were the JCTR *Bulletin*, The Challenge and Icengelo magazines.

#### **6.1.1.3 Accessibility of BNB information**

Respondents were asked to state whether it was easy for them to access BNB information and state how they were currently receiving it. Those who said it was not easy to access BNB information accounted for 82 percent while 18 percent felt it was easy because they were able to get it through radio, television and from a focal person. The reasons advanced for the difficulty in accessing BNB information were that BNB data is not widely circulated largely due to JCTR little contact with households, especially in Lusaka, and that others did not know where to get BNB information apart from accessing that information on media. Some households in Luanshya and Livingstone acknowledged receiving it regularly from field researchers and focal persons.

It was also noted by respondents in all the three towns that lack of access to BNB information was also due to language barrier (i.e., BNB information is communicated in English). Respondents were further asked whether they were happy with the present means being used to disseminate BNB information or not. Those who expressed happiness citing easy access through media were at 71 percent and those who expressed displeasure citing lack of access to media and language barriers accounted for 29 percent.

#### **6.1.1.4 Why respondents don't know about JCTR BNB**

All the respondents unaware of the JCTR BNB (83 percent) were asked to give reasons. However, 7 percent of the respondents declined to give reasons. Four common responses advanced were: (i) *media-related*, respondents do not have television and do not follow local news, do not read newspapers, never heard or seen it on radio or television; (ii) *JCTR-related*, never heard of JCTR, BNB is not well published, never heard of BNB, have heard of JCTR but not BNB, JCTR is not doing enough to reach households; (iii) *content-related*, BNB sounds like a foreign idea, language barrier (i.e., communication only in English); and (iv) *recipient-related*, respondent has never made any efforts to access BNB information and do not know where to get BNB information.

#### **6.1.1.5 Groups for which BNB information is most relevant**

When respondents were asked which groups they felt the BNB information could be most useful, in order of preference, they mentioned: (i) government, (ii) trade unions, (iii) NGOs, (iv) church, (v) private sector, (vii) resident development committees, and (viii) households.

#### **6.1.1.6 Scaling-up JCTR BNB information dissemination efforts**

All the 100 respondents were asked to give their advice on why and how JCTR could scale-up dissemination of BNB information to households. Most respondents felt it should be scaled up because more people at household level are still unaware of the BNB and its use. The JCTR BNB is perceived as a good initiative outlining basic needs and provides a forum for raising social justice issues like “just wages” and BNB information could be used as a tool to weigh the economic performance. Respondents recommended that JCTR should make an effort to promote the BNB at household level, and translate or simplify BNB in local languages and communicate it through local community media.

Five communication strategies were proposed. JCTR should make use of: (i) communication (or popular) materials, like flyers, posters, booklets, pamphlets, bill boards; (ii) established institutions, such as the church to communicate and disseminate BNB sermons, engage more small group discussions to explain use of

BNB; (iii) media (print and electronic), public, private and community, regularly run adverts, sponsor local programmes on BNB, and consider using other media to capture households not tuned in to local media, e.g., British Broadcasting Corporation (BBC) to communicate BNB information. JCTR should also utilise: (iv) community related initiatives, like popular drama, community meetings, workshops, seminars, BNB campaigns (halls, football grounds, markets, schools), and set up a deliberate sensitisation programme, e.g., organise community members to sensitise people; and (v) open resource centre use community libraries to supply information and materials about the BNB to the community.

### **6.1.2 JCTR Strategic Stakeholders**

The assessment conducted in the three locations revealed that all the sixteen interviewed stakeholders expressed a better understanding of what the BNB information is able to achieve in terms of its use, for example, as a tool for policy change. Notable was their confidence and clear explanation of what BNB information is and how it could be used as an entry point into wider discussions on economic and social situation of the country such as in wage negotiations and policy change formulation and implementation. This is despite the fact that most of them started receiving BNB information from the JCTR more than a year ago, with exception of one organisation that started receiving it six months ago.

#### **6.1.2.1 How stakeholders came to know about JCTR BNB information**

These organisations stated that they came to know about BNB information through the radio (ZNBC 1, 2 and 4; Q-FM, Phoenix, Yatsani and Icengelo); television (ZNBC and Muvi); newspapers (The Post, Times of Zambia, Weekly Angel, National Mirror and Zambia Daily Mail). Other ways include: JCTR website; JCTR brochure; JCTR *Bulletin*; through an organisation respondent is working for; friend sharing through e-mail; and read about it in a magazine (Commerce Gazette, Civil Servant Union of Zambia Newsletter and JCTR *Bulletin*).

#### **6.1.2.2 How respondents receive JCTR BNB information**

Stakeholders in Lusaka, Luanshya and Livingstone acknowledged receiving monthly BNB information from JCTR either by e-mail or fax, passing through JCTR office, visiting JCTR website, attending press briefing and/or public fora where BNB

information is discussed or displayed. In addition, stakeholders in Luanshya and Livingstone mentioned receiving town-specific BNB information through a focal person and field researcher. The two field researchers all receive BNB information by postal mail and currently have no access to e-mail or fax facilities.

**6.1.2.3 Difficulties encountered in accessing JCTR BNB information**

There were two points of views which were expressed with regard to accessing BNB information. First, one group of organisations (especially Lusaka based groups) said there were not encountering any difficulties in accessing BNB information especially through e-mail or JCTR website. As expressed by one respondent: “It is usually on time. Since we’re assured of receiving it via e-mail, so far we don’t seem to have any difficulties”. A media institution noted one difficulty, JCTR should have “a precise day in a month when we should be expecting the report (BNB information), it will help us in making follow ups”. It seems therefore that the JCTR does not have a specific day in the month when BNB information is released. For this reason, JCTR should consider setting such a specific time (or week) when recipients could obviously expect it.

Second, another group expressed that they encountered difficulties such as seeing only excerpts of BNB information as reported in newspapers, such as The Post. “Normally, access through e-mail helps, but we hardly receive it through other means”, pointed out one respondent. Until now, BNB information (statistical data or press release) is not fully published in any newspaper or magazine (except JCTR Bulletin, with limited distribution to subscribers and well-wishers). JCTR should therefore make use of other channels of communication such as newspapers (Times of Zambia, Daily Mail and The Post) with wider circulation.

**6.1.2.4 Scaling-up JCTR BNB information dissemination efforts**

Respondents representing sixteen organisations were asked for their opinion on whether they think the JCTR BNB information dissemination efforts should be scaled-up. All of them commended the JCTR’s present efforts and made further suggestions of how this could practically be done. The reasons cited by respondents for scaling up BNB information dissemination efforts were that it is essential that more people access this data and employers should be targeted since they play a

significant role in improving living conditions for the working masses. They also stressed that BNB information compels employers to revisit and review remuneration for their staff.

Among the suggestions made were that JCTR should consider undertaking surveys in other related BNB data including inflation rates and literacy rates. “We need more information beyond the BNB, such as literacy, employment and malnutrition rates,” said one respondent. JCTR should broaden its coverage areas in terms of data collection and dissemination activities through, for example, use of community and private radio and television stations (e.g., Zambezi radio in Livingstone and Muvi television). JCTR should introduce a monthly television programme where JCTR staff could talk about BNB information.

Moreover, respondents were requested to give advice on how the JCTR BNB information could run their advocacy efforts more effectively. According to respondents JCTR should, among others, follow up and comment on major social conditions’ fluctuations, introduce a series of television call-in programme where members of the public can participate, regularly share some main issues of advocacy and should seek comments and contributions from partner organisations (e.g., trade unions) to incorporate in their lobby and advocacy activities.

Others proposed that JCTR should produce quarterly press release or short write-up on overall trends in prices and its implications on well-being. “Compile on a yearly basis all BNB and publish an informative analytical booklet of progress or non-progress throughout the year, and getting the message not just to policymakers, but also to all people so that JCTR efforts could be backed by popular support”, advised a Lusaka stakeholder. JCTR should consider publishing BNB statistical information and press statement (in full) in all the daily newspapers, promote more press discussion and improve on communication links and networks, for example, by holding monthly briefing on the basic needs reports rather than just faxing or e-mailing BNB information to media institutions.

**6.1.2.5 Commendation of stakeholders**

JCTR should continue informing stakeholders about BNB information through e-mail and website since these means are efficient. However, for those who have no

access to such facilities, bulletins and newsletters sent to those interested institutions would suffice. Also JCTR should consider publishing BNB data monthly in and/or as a specific supplement in national newspapers, e.g., The Post Business Supplement and Times of Zambia. In addition, stakeholders generally appreciated JCTR's commitment to conducting monthly price surveys of food and non-food items. Overall, BNB information is perceived by many as a very useful instrument, well-intended and appreciated effort among trade unions. It has become necessary "ammunition" in the quest for improved conditions of service of employees.

## **6.2 Use and/or Not Use of the JCTR *Basic Needs Basket***

Another important component of the evaluation related to investigating households and stakeholders use and/or not use of the BNB information. Respondents were asked if they have ever used BNB information for any kind of purpose, cite specific examples, and if not give reasons. The use of BNB information is mostly appreciated by JCTR stakeholders (e.g., as a tool for wage negotiation) and in few instances it has been used by households (e.g., as a guide in household budgeting).

### **6.2.1 Households' use of JCTR BNB information**

There were incidences (29 percent) of use of the BNB among households, especially in Luanshya and Lusaka. BNB information has so far been used for purposes of households' monthly budget. Successful uses (18 percent) of the BNB were pointed out by respondents in terms of prudent use of money during market shopping. Conversely, other respondents (53 percent) expressed ignorance of how to use BNB information citing reasons that they were not sure of how to use it.

### **6.2.2 Strategic stakeholders' use of JCTR BNB information**

Of the 16 strategic stakeholders involved in the assessment, 12 organisations cited concrete instances when they used BNB information. Examples include wage negotiations, quoted to justify the extent of poverty in research and funding proposals, presentations, reports, in a logical framework as a poverty indicator and as a tool to lobby for policy change. BNB information has equally been used as a best practice reference for comparative and informative analytical information on cost of living in their annual reports. International organisations have for example

used BNB information in general policy considerations in their aid programmes, during negotiations with their headquarters concerning salary scales for local staff and setting salaries for their domestic staff. Media institutions have used it in comparison with CSO basket to balance their business news stories.

Trade unions have used it as a main basis for their argument in bargaining for salary increments and better conditions of service. These unions indicated that in most instances when they used BNB information, it yielded intended results. Trade unions such as the Civil Servants and Allied Workers' Union of Zambia (CSAWUZ) have used the BNB information on three occasions to: (i) demand for improved wages for civil servants during negotiations, (ii) monitor changes in cost of living on monthly basis, and (iii) as a benchmark for income tax exemption threshold. CSAWUZ cited particular occasions like a court ruling in 1999/2000 which considered the union evidence of increased cost of living based on BNB information, and used it as a benchmark in 2003 CSAWUZ-GRZ negotiations and secured a wage increase (about 80 percent average increase) and in justifying an increase of tax exemption threshold from K320,000 to K500,000 in the 2006/2007 budget submissions.

### **6.3 Effectiveness and/or Efficiency of Means Used**

A rating scale was administered to 100 respondents in the three towns to find out the kind of means they think could best achieve desired results with regard to reaching out to the intended audience. This assessment evaluated 12 present means the JCTR is using in disseminating BNB information: e-mail, fax, postal mail, newspaper, radio, television, magazine, hand to hand (given out at public meetings), word of mouth (community outreach by JCTR staff), field researchers, focal person and strategic stakeholder (partnership). The twelve means or channels could be divided into two main categories: (i) *community outreach* (e.g., focal person, field researcher, strategic stakeholders, hand to hand, word of mouth), (ii) *media outreach* (radio, television, magazine, e-mail, fax, postal mail, newspaper).

#### **6.3.1 Households' Perception**

According to households' assessment (Cfr. Appendix VII, Table 6.1) in order of preference, the most preferred (excellent) means include dissemination through



use word of mouth, hand to hand, strategic stakeholder, field researcher, focal person; and through use of media outreach especially the television, radio, magazines, newspapers. Conversely, the less favoured (poor) means of reaching out to households included fax, e-mail, magazine, postal mail and newspaper. Some of the reasons given by respondents explaining this perception were due to either lack of access to these channels of communication and less interest in local news.

Respondents interviewed indicated that communicating to households demands some form of community outreach initiatives, strategies and techniques. Livingstone respondent observed, “You can only succeed if there is also a concern to the consumers of the information, such as relating the BNB information to their realities of life. Once people reach that stage of knowing to read a document, reflect and analyse it critically, something could happen”. This is largely influenced by the kind of communication channels used.

**6.3.2 JCTR Strategic Stakeholders’ Perception**

Similarly, a rating scale was administered among JCTR stakeholders to evaluate effectiveness of the current means used to disseminate BNB information to their stakeholders in Lusaka, Luanshya and Livingstone. According to the results of the rating scale in Lusaka (Cfr. Appendix VII, Table 6.2) the most preferred (excellent) means of receiving BNB information is by e-mail, television, radio, and some kind of word of mouth (such as brief explanation on the relevance of BNB information). Other efficient (good) means are through the newspapers, magazine, strategic stakeholder, and on average, through fax and postal mail.

The evaluation also demonstrated that accessibility and availability of e-mail and fax facilities and newspapers explains respondents’ preference of these means in the dissemination of BNB information. As one respondent commented, “The organisation buys newspapers daily and if it (BNB information) is published, we will easily access it”. Similar responses were observed in Luanshya and Livingstone with stakeholders (Cfr. Appendix VII, Table 6.3). The assessment shows that the most preferred means are e-mail, fax, hand to hand, focal person and strategic stakeholders. A less preferred channel is through postal mail.

The rating scale administered to both households and JCTR strategic stakeholders raise questions with regard to what these organisations perceive to be most effective and/or efficient means to reach them. On one hand, media outreach is perceived by households is less preferred, while community outreach is the most favoured. On the other hand, media outreach is preferred most by strategic stakeholders in comparison with community outreach in the dissemination of BNB information.

#### **6.4 Conclusion**

The evaluation involved 100 respondents and 16 JCTR stakeholders (partners in policy change advocacy) within Lusaka, Luanshya and Livingstone. Levels of awareness and use of BNB information is higher among stakeholders and than within households. The assessment revealed that 83 percent of the household respondents did not know about BNB information, while 17 percent were aware. Households' awareness was lower in Lusaka at 12 percent and Luanshya at 38 percent than Livingstone at 50 percent. In terms of accessibility of BNB information, 71 percent of the respondents expressed happiness citing easy access through media (e.g., radio and television) and 29 percent expressed displeasure citing lack of access to media and language barriers.

BNB information is perceived by many stakeholders as a necessary instrument in the quest for improved employee's conditions of service and it has also been used by households as a guide in monthly budgeting. Both stakeholders and households encouraged scaling-up BNB information dissemination efforts through use of, for example, communication materials (e.g., flyers), established institutions (e.g., churches), and media (e.g., television) including traditional media like drama.

## CHAPTER 7

### CONCLUSIONS AND RECOMMENDATIONS

#### 7.1 Overview

This chapter gives a synopsis of key conclusions and recommendations of the evaluation, which endeavoured to examine the communication strategy the JCTR is using in disseminating its BNB information. The assessment sought to determine the target audience, dissemination process, public awareness and use of BNB information and the overall effectiveness and/or efficiency of the communication strategy. The end of the chapter proposes some key aspects necessary in planning an effective communication strategy.

#### 7.2 Conclusions and Recommendations

It was evident in the assessment that JCTR through the collection of BNB information is addressing an economic and social problem affecting the majority of the poor in Zambia, especially households' struggles in affording essential basic food and non-food items. In order to increase public awareness and win their support for policy change initiatives arising from BNB information, JCTR over the years has been pursuing some form of communication strategy. The organisation has identified strategic stakeholders including NGOs, government, trade unions, community groups, professional institutions and households. BNB information is primarily packaged in two forms: a statistical publication and an accompanying press release. This data is often disseminated through the media, focal persons and presentations at workshops and seminars. There are some efforts in formalising feedback mechanism apart from field researchers' records book and the SCRP's impact book, documenting mainly information of how organisations are using BNB data and impacts, if any. The next sections highlight main conclusions and recommendations drawn from the evaluation.

*7.2.1 Objectives of the BNB information campaign:* The JCTR BNB activity is informed by communication objectives guiding its overall collection and dissemination process, such as (i) to inform public actors like government about the cost of living in the country, (ii) to inform and/or as a response to policy change, and

(iii) as a guide for budgeting at household level. Objectives like these are the basis of any communication strategy and provide insights in the assessment of the available resources an organisation requires to operationalise its strategy. Accordingly, JCTR has effectively reached out to its strategic stakeholders, but many households do not know how BNB information could be used as guide for budgeting.

Recommendation: JCTR should devise also specific objectives for conducting BNB activity among households. These could include: (i) create and increase awareness and ownership around the concept and idea of BNB, (ii) mobilise the target audience for action. This could help reach out to intended target audience more effectively and efficiently.

*7.2.2 Significance of BNB information:* There is a growing acknowledgement among stakeholders of BNB information as an entry-point into wider discussions around issues of social and economic development in Zambia. It is therefore perceived as an important initiative, a powerful tool for influencing policy direction as it relates to the cost of living and an aid (or a guide) for household budgeting especially among numerically literate households.

Recommendation: JCTR should scale-up its dissemination and advocacy efforts among different age-groups with messages tailored according to the target audience needs. Particular attention (such as finding a way to interpret prices of food and non-food items in a language understandable) must be made regarding the kinds of messages to households.

*7.2.3 Knowledge and use of BNB information:* Evidence from the evaluation shows that strategically targeted stakeholders in Lusaka, Livingstone and Luanshya know what the BNB information is and how to use it. This has been due to the JCTR's advocacy efforts that include networking and regular contacts with these groups. There is however less BNB related advocacy and dissemination efforts (e.g., training and education) at households' level. This has, in part, subsequently affected households' knowledge and use of BNB information. While all the JCTR strategic groups consulted during the evaluation were aware of BNB information and have used it for various purposes like in wage negotiations, 83 percent of household respondents did not know what BNB information is and consequently how to use it (e.g., as a guide to household budgeting).

Recommendation: JCTR should adopt communications tools meant to reach out to households including instructional techniques and grassroots mobilisation techniques if more people are to know how to use the BNB information. *Instructional techniques* is useful to train or educate households have the opportunity of becoming familiar with the complex issues (emerging from BNB statistical data), and acquiring knowledge and skills for improving their situation (relating BNB data to their living conditions). *Grassroots mobilisation* techniques, which utilises community mobilisation, partnership or networking, and group formation are useful in organising the community, or part of it, in addressing the main problem facing the community or group. In designing a more effective communication strategy, JCTR could use a combination of instructional and group mobilisation techniques.

*7.2.4 Dissemination scope:* BNB statistical publication dissemination is largely limited and restricted to BNB teams in specific towns where it is collected. Moreover, the way BNB information is packaged has implications on the kinds of audience that will find it useful (e.g., statistical publication has proved quite useful among trade unions, and press releases are appreciated more by media organisations).

Recommendation: JCTR should widen its BNB information dissemination and advocacy efforts to include even areas outside the six select towns. Some ways of effectively reaching out include empowering BNB teams to conduct training and advocacy efforts in surrounding towns, and building networks with community groups.

*7.2.5 Implementing partners and target audience:* JCTR has identified several partners in its dissemination of BNB information. As highlighted in this paper, the more definitive an organisation can be about the specific audience it seeks to address, the more likely it is able to plan a very targeted and efficient campaign. This, in fact, guards against confusing the desired locus of behaviour or attitude change (individual, mass public, specific subgroups, or elites) which can undermine an entire communication strategy. The question of who has the power to make change needs to be distinguished from the easier issue of who wants to listen to the message the organisation is disseminating.

Recommendation 1: JCTR should utilise the different levels (e.g., community, district, provincial, national, and international) in the implementation of its BNB

communication campaign. Each level could focus on the audience specific and relevant to it and adapt the activities as necessary in order to elicit support and action. Identifying key target groups is a very important stage in devising appropriate ways of effectively reaching any targeted audience. This is precisely because what may work for one group may not necessarily work for the other group.

Recommendation 2: In order to maximise impact within its limited resources, JCTR should strengthen its alliance with similar organisations advocating for policy change (meant to improve living conditions of people) through key groups that have both the structure and capacity to reach or exert influence on their wider memberships and others in society. These should be strategically identified. Some of these groups that could help promote BNB information and mobilise support for its implementation among households and strategic stakeholders include:

- (a) *Media institutions:* The media is an important partner for building mass public support. JCTR should develop and build proactive relationships with media organisations. One of the ways to establish this kind of relation is to arrange regular briefings and BNB workshops with reporters, journalists and media executives in an on-going basis. In implementing this campaign JCTR could use the media not only as a channel to convey their messages to the target audience, but also as major players as opinion moulders. Examples of these institutions include: community radio stations in general sense including traditional media like drama and ceremonial festivals.
- (b) *Religious groups:* Religious leaders have access to and exercise considerable moral authority with large numbers of people with whom they could advocate on behalf of JCTR. Working with religious groups like Evangelical Fellowship of Zambia (EFZ), Council of Churches in Zambia (CCZ) and Zambia Episcopal Conference (ZEC) could also have the advantage of raising awareness among respective religious groups. Hence, JCTR should attempt to brief and gain the support of religious leaders about BNB information. It could also devise a plan with major religious groups to spread the word about BNB in their sermons (or homilies).
- (c) *Professional organisations:* JCTR should seek to maintain regular contacts with academia and intellectual groups and professional organisations, such as

the Law Association of Zambia (LAZ), Media Institute of Southern Africa (MISA) Zambia and Zambia Institute of Chartered Accountants (ZICA). Such an interest could help sustain a campaign and eventually facilitate feedback.

(d) *Business groups*: are a critical set in civil society. Efforts should be made to provide, for example, up-to-date relevant BNB information and gain their attention. Some of the groups could be Zambia Business Forum (ZBF), and Zambia Association of Commerce, Chamber and Industries (ZACCI).

(e) *Coalition/alliance networks*: to undertake successful formal policy initiatives JCTR should continue to cooperate with other NGOs working in different arenas (e.g., child-related and women concerns) and targeting a variety of players (e.g., donors) for advocacy and influence. Building networks among influential policymakers and getting their support provide strength for gaining policy influence.

Other groups to be targeted include: parliamentary committees (economic affairs) and government line ministries (e.g., Ministry of Finance and National Planning), traditional leaders (House of Chiefs), and tertiary institutions (universities and colleges).

**7.2.6 Media advocacy**: The JCTR has quite successfully used both print and electronic media (and to a lesser extent, traditional media like drama) to advance its policy recommendations arising from BNB information. This is evident in its selection of policy initiatives like minimum wage targeting trade unions that are organised to put pressure on policymakers like government and private sector employers, who hold power over decision-making on those policy options. However, as perceived and illustrated in the rating scales of households and strategic stakeholders, a heavy reliance on the use of radio, television, newspaper, e-mail and website is appropriate (in fact, most effective and efficient) to individuals and organisations with access to such facilities, but less effective and efficient to those with less access to these vehicles of communication.

**Recommendation:** JCTR should continue utilising media advocacy by not only engaging in activities like press conferences that the media could attend and cover, but also engage in local events that many households are involved in. As noted

earlier media advocacy can influence public awareness and support, which in turn can impact on policymaker support (whether or not the policymaker supported a campaign's stance on a particular issue in the first place), and can also impact on a policymaker support directly.

**7.2.7 Feedback mechanism:** It was discovered in the assessment that JCTR is in the process of devising a feedback mechanism to, among others, inform its dissemination and advocacy efforts. At the moment, the Social Conditions Research Project keeps an Impact Record Book and field researchers keep Record Books. Contents recorded in these books are largely dependant on end-users sharing with JCTR how they used BNB information and if there was any impact at all.

**Recommendation:** JCTR should formalise its feedback mechanism. There is need to have a feedback system to inform its communication strategy, such as, devising a simple questionnaire administered either quarterly or annually. It should also hold stakeholders' feedback workshops, for purposes of *process-evaluation* (e.g., assessing outcomes like how often the message got out and how many brochures were sent) and *summative-evaluation* (e.g., assessing outcomes such as which organisations are using BNB information, and how they are using it). According to Mefalopulos and Kamlongera (2004), a *summative-evaluation* is necessary at the end of the planning and implementation process of a given project or activity for the organisation to evaluate the overall impact of the intervention in view of addressing the degree of success or failure. This means, once all the activities of the project's intervention in relation to the set objectives have been implemented there is need, for example, to assess how well the strategy and how it benefited (practical effect or impact) the community. *Summative-evaluation* could either be quantitative (concerned with objectives and verifiable measurement related to the project objectives) or qualitative (measures the degree of success of the project activities as perceived by the community) (ibid.).

It could be deduced from this study that one of the main purposes of designing a communication strategy is to address and solve problems either at the grassroots level or policy level. Such an endeavour makes use of the available communication methods (e.g., instructional design and group mobilisation), techniques (e.g., information and advocacy) and media (e.g., popular print and



electronic media including traditional forms like drama). Many challenges still remain, particularly in scaling up advocacy initiatives from national to local level, and creating durable and effective community networks. These demands building of households' skills and confidence in carrying out advocacy work. The success of such an endeavour largely depends on the organisation's communication strategy.

### **7.3 Planning an Effective Communication Strategy**

Planning an effective communication strategy involves a well-planned series of actions aimed at achieving certain objectives through the use of communication methods, techniques and approaches (Mefalopulos et Kamlongera, 2004). One model of communication helpful in devising a communication strategy is Harold Lasswell's enduring five questions: "who says what to whom via what channels with what effects?" (Rogers, 1994, 98) and the sixth element added by researchers "why?" (Shoemaker et Reese, 1996, 12). The six elements provide a structure of the different elements necessary in designing an effective communication strategy being proposed in this study.

*7.3.1 Problem definition (defining communication requirements):* The first step an organisation must be able to answer is: what is the problem? The initial step toward "a solid communications plan is the accumulation of descriptive data and expert opinion to explain the overall problem the organisation wishes to address" (Gilliam et Bales, 2004). It is important to determine whether the organisation perceives the problem as public or individual, and the extent to which the public attitudes and perceptions are also part of the problem. This guides the organisation in terms of which appropriate communications campaign to adopt, whether individual behavioural change or policy change, and the kinds of tools and techniques the organisation eventually utilises in the dissemination of its message. The second step is to identify the organisation's policy agenda or other solutions to ameliorate the problem. The organisation, as Julia Coffman (2003) notes, must identify precisely what short-term or long-term outcomes it hopes to achieve as a result of its overall effort. Finally, it is important to determine the precise role that communication can play as part of the strategy for solving the problem identified.

*7.3.2 Audience (identifying stakeholders):* "Audience segmentation" is the term used to disaggregate mass public specific demographics such as socio-economic status

(Mefalopulos et Kamlongera, 2004). The more definitive an organisation can be about the specific audience it seeks, the more likely it is able to plan a very targeted and efficient campaign. The appropriate target audience for a communications campaign should become obvious as an organisation assesses the problem. However, Gilliam and Bales (2004) observe that communications planners sometimes confuse the locus of behaviour or attitude change desired (individual, mass public, specific subgroups, or elites) which can undermine an entire communications strategy. This is why it is important to distinguish the one who has the power to make change from the easier issue of who wants to listen to the message the organisation is disseminating.

*7.3.3 Message (generating communication content):* Crafting a message is often the first task organisations set out to tackle in creating a communications campaign. An effective message results from taking the audience's pulse on an issue and gauging its predispositions, and then determining how to effectively redirect its attention (Mefalopulos et Kamlongera, 2004). Thus, an evident objective is to focus on positive achievements and the benefits the message brings. This requires clear agreement and careful coordination among those who act as spokespersons or information sources for a particular message. Inconsistent facts, figures, emphases and viewpoints are to be avoided. The advocacy and communications campaign requires specific materials to communicate the intended message such as posters, flyers, brief packages and speeches. It is necessary to decide what type of material is required for the specific campaign.

*7.3.4 Medium:* Whether an organisation chooses to broadcast over the internet, television or pass out pamphlets depends upon the predetermined campaign goals and theory of change (individual or policy change) under which the campaign is operating (Coffman, 2003). The choice of media should be made on the basis of matching the medium to communications goals and targets. This suggests that if an organisation does not need television to reach its intended audience, it should not pay for it simply because it seems like a missing component in a communication campaign. Moreover, there is a no "pre-packaged" formula of media channels that comprise communications campaign. The channels must be selected because they effectively reach the targeted audience. For example, media advocacy is oriented toward news and editorial comments as the key vehicle to influence policymakers

and policy elites. Similarly, policy campaigns might buy one full-page advert in the public media, hoping to convince lawmakers that the public is on notice with respect to a particular issue or piece of legislation (Gilliam et Bales, 2004).

**7.3.5 Evaluation (feedback):** It is important for an organisation to assess and reassess the impact, target and quality of its communications. One systematic way to judge the contribution of communications activities to long-term social change is to monitor media content and public opinion over time (Gilliam et Bales, 2004). For example, when an organisation targets a certain geographical area or population, it should invest in baseline and annual reviews of media and public opinion. William J. McGuire suggests in *Theoretical Foundations of Campaigns* (1989) that each campaign should set up a series of probable effects that are likely to result from the communications interventions and gauge the effectiveness of its strategy at each important stage.

The five elements (problem identification, audience, message, medium and feedback) point to the fact that each communication campaign must be developed to reach specific audiences with tailored messages, materials and interventions, strategically designed to meet specific objectives. This, in effect, implies that a communication strategy should be *consistent* with the project framework, *feasible* (in relation to the resources and the timeframe), and *effective* (makes the best use of the available resources in order to achieve the set objectives) (Mefalopulos et Kamlongera, 2004).

## **7.4 Conclusion**

The primary goal of the study was to evaluate the existing communication strategy the JCTR is using to disseminate BNB information, a monthly price survey of basic essential and non-food items needed by an average sized household in Zambia and propose ways of making the communication strategy more effective. The assessment, which mainly used a semi-structured questionnaire administered to one hundred respondents, endeavoured to assess public awareness, use and/or not use of BNB information. The assessment revealed that awareness of BNB information among strategic stakeholders is more remarkable than within households. This is, in part, demonstrated by stakeholders' use of BNB information in many ways including wage negotiations and as a tool into wider discussions policy

initiatives sensitive to the needs of households' struggles in affording essential basic food and non-food items. Conversely, there were few instances when households used BNB information as a guide for budgeting. In addition, the use of community outreach techniques (e.g., focal person, field researcher) on one hand is more appropriate in order to gain the support of households. On the other hand, media outreach techniques (e.g., internet, television) have proved more effective among stakeholders.

This study too demonstrated that the biggest issue in a communication strategy is selecting communication approaches to use (e.g., participatory discussion themes/message design, instructional design and group mobilisation) since this is the time communication intervention begins. These approaches provide direction and purpose for using different techniques and media most effective and appropriate for a particular situation. In order to reach out to many households, JCTR should therefore adopt (i) instructional techniques that makes use of training and education of people becoming familiar with the complex issues (e.g., emerging from BNB data) and acquiring knowledge and skills for improving their situation (e.g., relating BNB data to their living conditions); and (ii) grassroots mobilisation techniques which utilises community mobilisation, networking and group formation in organising the community or part of it in addressing the main community problem.

There is need for the JCTR and organisations engaged in similar advocacy work to focus not only on outputs or measures of their own communications performance (e.g., counting the number of press conferences held), but also focus on the outcomes of those efforts for the audiences they are trying to reach. Moreover, this need should not only be to determine whether the communications effort definitively caused later effects, but to learn how to do the work better. Future studies should therefore open the range of evaluation possibilities (e.g., content or messages sent out) that contribute to learning or continuous improvement. As hopeful as wide awareness might be in the future for households, JCTR must pay particular attention to strategic partners for its success in policy change campaigns.

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## APPENDICES

### APPENDIX I: QUESTIONNAIRE ON THE JCTR *BASIC NEEDS BASKET* ADMINISTERED TO HOUSEHOLDS IN LUANSHYA, LIVINGSTONE AND LUSAKA

*Introduction: The purpose of this exercise is to evaluate the nature and extent of public awareness and/or use of the monthly JCTR Basic Needs Basket or "Food Basket".*

**Instruction:** tick or fill in the answer for each question where necessary.

#### Section A: JCTR *Basic Needs Basket* Information

1. Are you aware of the JCTR *Basic Needs Basket* or "Food Basket"?

1. ☐ Yes
2. ☐ No

2. If yes, what do you know?

3. If no, what is(are) the reason(s)? [Leave the next questions and go to question 24]

4. How did you come to know about the JCTR *Basic Needs Basket*? (tick all that apply)

1. ☐ heard on the radio
2. ☐ heard on the television
3. ☐ read in the newspaper
4. ☐ through an organisation I am working for
5. ☐ through a co-operating partner
6. ☐ through a friend
7. ☐ through JCTR "focal person"
8. ☐ through JCTR "field researcher"
9. ☐ through e-mail
10. ☐ through the JCTR website
11. ☐ while attending a workshop/seminar/public discussion
12. ☐ JCTR *Basic Needs Basket* brochure
13. ☐ Other (please specify).....

5. If through television, which one(s)? (tick all that apply)

1. ☐ ZNBC
2. ☐ TBN
3. ☐ Muvi
4. ☐ Other (please specify) .....

6. If through the radio, which one(s)? (tick all that apply)

1. ☐ ZNBC Radio 1
2. ☐ ZNBC Radio 2
3. ☐ ZNBC Radio 4
4. ☐ Q-FM
5. ☐ Phoenix
6. ☐ Liseli
7. ☐ UNZA
8. ☐ Yatsani
9. ☐ Hot FM
10. ☐ 5-FM
11. ☐ Sky FM
12. ☐ Zambezi
13. ☐ Chikuni
14. ☐ Maranatha
15. ☐ Icengelo
16. ☐ Mosi-oa-tunya
17. ☐ Hone
18. ☐ Maria
19. ☐ Other (please specify) .....

7. If through the newspaper, which one(s)? (tick all that apply)

1. ☐ Times of Zambia
2. ☐ National Mirror
3. ☐ Zambia Daily Mail
4. ☐ Weekly Angel
5. ☐ The Post
6. ☐ Southern Times
7. ☐ Other (please specify) .....

8. If through a magazine, which one(s)? (tick all that apply)

1. ☐ Commerce Gazette
2. ☐ The Challenge
3. ☐ CSUZ Publication
4. ☐ JCTR Bulletin
5. ☐ Development Zambia
6. ☐ Other (please specify) .....

9. What do you know about the JCTR *Basic Needs Basket*?

1. ☐ It shows the cost of food items
2. ☐ It shows employees' monthly wages
3. ☐ It shows a comparison of the cost of food prices and employees' wages
4. ☐ Other (please specify) .....

10. When did you first hear about the JCTR *Basic Needs Basket*?

1. ☐ less than 6 months
2. ☐ between six months and one year
3. ☐ more than 1 year

11. Is it easy for you to access the published monthly JCTR *Basic Needs Basket*?

1. ☐ Yes
2. ☐ No

12. If yes, how do you access it?

1. ☐ field assistant gives us a copy
2. ☐ contact person in our organisation



3. ☐ read from the newspapers
4. ☐ read from the magazine
5. ☐ hear from the television
6. ☐ hear on radio
7. ☐ Other (please specify) .....

13. If no, why is it not easy?

14. In which way(s) do you think the JCTR *Basic Needs Basket* information (monthly data) can best be disseminated?

15. Which group(s) do you think the JCTR *Basic Needs Basket* is most useful? (tick all that apply)

1. ☐ Non-Governmental Organisation (NGO)
2. ☐ Church
3. ☐ Households
4. ☐ Trade Unions
5. ☐ Central government
6. ☐ Local government
7. ☐ Faith Based Organisation (FBO)
8. ☐ Private business/company
9. ☐ Orphans and Vulnerable Children (OVC) Organisation
10. ☐ Market Committee
11. ☐ Resident Development Committee (RDC)
12. ☐ Other (please specify) .....

16. Are you happy with the present means (mediums) of publicising the JCTR *Basic Needs Basket*?

1. ☐ Yes
2. ☐ No

17. Please, explain why?

18. Have you ever used the JCTR *Basic Needs Basket* for any kind of purpose?

1. ☐ Yes
2. ☐ No

19. If yes, cite some examples of how you have used the JCTR *Basic Needs Basket*?

- 1. ☐ monthly budget
- 2. ☐ advocate for policy change
- 3. ☐ wage negotiations
- 4. ☐ research
- 5. ☐ education (economic literacy)
- 6. ☐ community organising
- 7. ☐ Other (please specify) .....

20. If no, why?

- 1. ☐ not sure how to use it
- 2. ☐ used it but it failed
- 3. ☐ Other (please specify) .....

21. Did the JCTR *Basic Needs Basket* make an impact?

- 1. ☐ Yes
- 2. ☐ No

22. What kind of impact?

23. What other comments do you have?

24. Why don't you know about the JCTR *Basic Needs Basket*?

- 1. ☐ don't have television
- 2. ☐ don't have radio
- 3. ☐ don't follow the news
- 4. ☐ don't read newspapers
- 5. ☐ never heard of JCTR
- 6. ☐ any other reason(s) (please specify) .....

25. (For those who have not heard about the "JCTR *Basic Needs Basket*") Explain what it is. Then, ask: How do you think the JCTR could make it easier for you to access this information?

26. How would you rate the means used in the dissemination of the JCTR *Basic Needs Basket*? (Please tick)

Score 1-5 means: 1=poor    2= fair    3=average    4=good    5=excellent

Means	1	2	3	4	5
e-mail					
fax					
postal mail					
newspaper					
radio					
television					
magazine					
hand-to-hand					
word-of-mouth					
field researcher					
focal person					
strategic stakeholder					

**Section B: Bio-data and Demographic Information**

27. Date: .....

28. Town & location: .....

29. Where do you live?

- 1. ☐ Low density area
- 2. ☐ Medium density area
- 3. ☐ High density area

30. Sex

- 1. ☐ Male
- 2. ☐ Female

31. Age

- 1. ☐ Below 20 years
- 2. ☐ 20-24
- 3. ☐ 25-29
- 4. ☐ 30-34
- 5. ☐ 35-39
- 6. ☐ 40-44
- 7. ☐ 45-49
- 8. ☐ 50-54
- 9. ☐ 55-60
- 10. ☐ Above 60

32. Marital status

- 1. ☐ Single
- 2. ☐ Married
- 3. ☐ Divorced
- 4. ☐ Widowed
- 5. ☐ Separated

33. Household size

- 1. ☐ Less than 4 members
- 2. ☐ 5-9 members
- 3. ☐ more than 10 members

34. Education

1. ☐ No formal education
2. ☐ Primary (grades 1-7)
3. ☐ Secondary (grades 8-12)
4. ☐ College
5. ☐ University

35. How do you earn a living?

1. ☐ formally employed
2. ☐ self-employed
3. ☐ no source of income

36. If employed, what is your profession? .....

37. In which monthly income category do you fall?

1. ☐ no income
2. ☐ Less than 500,000 Kwacha
3. ☐ 500,000 - 1,000,000 Kwacha
4. ☐ 1,000,000 – 2,000,000 Kwacha
5. ☐ more than 2,000,000 Kwacha

## APPENDIX IIa: INTERVIEW GUIDE FOR JCTR STRATEGIC STAKEHOLDERS

1. Date: .....
2. Name of Organisation: .....
3. Briefly mention some of the activities your organisation does: .....
4. In which category does your organisation fall (e.g., NGO, FBO, RDC, Church, government, union, media, etc)? .....
5. How did you (as an organisation) come to know about the JCTR *Basic Needs Basket*?  
(tick all that apply)
  1. ☐ heard on the radio
  2. ☐ heard on the television
  3. ☐ read in the newspaper
  4. ☐ through an organisation I am working for
  5. ☐ through a co-operating partner
  6. ☐ through a friend
  7. ☐ through JCTR "focal person"
  8. ☐ through JCTR "field researcher"
  9. ☐ through e-mail
  10. ☐ through the JCTR website
  11. ☐ while attending a workshop/seminar/public discussion
  12. ☐ JCTR *Basic Needs Basket* brochure
  13. ☐ Other (please specify) .....
6. If through television, which one(s)? (tick all that apply)
  1. ☐ ZNBC
  2. ☐ TBN
  3. ☐ Muvi
  4. ☐ Other (please specify) .....
7. If through the radio, which one(s)? (tick all that apply)
  1. ☐ ZNBC Radio 1
  2. ☐ ZNBC Radio 2
  3. ☐ ZNBC Radio 4
  4. ☐ Q-FM
  5. ☐ Phoenix
  6. ☐ Liseli
  7. ☐ UNZA
  8. ☐ Yatsani
  9. ☐ Hot FM
  10. ☐ 5-FM
  11. ☐ Sky FM
  12. ☐ Zambezi
  13. ☐ Chikuni
  14. ☐ Maranatha
  15. ☐ Icengelo
  16. ☐ Mosi-oa-tunya
  17. ☐ Hone
  18. ☐ Maria
  19. ☐ Other (please specify) .....

8. If through the newspaper, which one(s)? (tick all that apply)

1. ☐ Times of Zambia
2. ☐ National Mirror
3. ☐ Zambia Daily Mail
4. ☐ Weekly Angel
5. ☐ The Post
6. ☐ Southern Times
7. ☐ Other (please specify) .....

9. If through a magazine, which one(s)? (tick all that apply)

1. ☐ Commerce Gazette
2. ☐ The Challenge
3. ☐ CSUZ Publication
4. ☐ JCTR Bulletin
5. ☐ Development Zambia
6. ☐ Other (please specify) .....

10. When did you first hear about the JCTR *Basic Needs Basket*?

1. ☐ less than 6 months
2. ☐ between six months and one year
3. ☐ more than 1 year

11. How do you receive the JCTR *Basic Needs Basket*? (tick all that apply)

1. ☐ By E-mail  
2. ☐ By Fax  
3. ☐ By Post  
4. ☐ By hand  
5. ☐ Other (please specify): .....

12. Mention some instances when you have used the JCTR *Basic Needs Basket*.

13. Were these efforts successful?

1. ☐ Yes
2. ☐ No

14. If yes, cite examples of where the JCTR *Basic Needs Basket* has been used and yielded positive results? (Where there any impacts?)

15. If no, what are(were) the reason(s) for its failure(s)?

16. How do you rate the means (mediums) used in the dissemination of the JCTR *Basic Needs Basket*?

Score 1-5 means

1=poor, 2= fair, 3=average, 4=good, 5=excellent

Means	1	2	3	4	5
e-mail					
fax					
postal mail					
newspaper					
radio					
television					
magazine					
hand-to-hand					
word-of-mouth					
field researcher					
focal person					
strategic stakeholder					

17. What kind(s) of difficulty(ies) do you encounter in accessing the monthly published JCTR *Basic Needs Basket*?
18. Should the JCTR *Basic Needs Basket* dissemination efforts be scaled-up?
- 1. ☐ Yes
  - 2. ☐ No
19. Why?
20. If Yes, how?
21. What advice do you have for the JCTR to improve its communication strategies of the *Basic Needs Basket*?
22. How can the JCTR *Basic Needs Basket* advocacy efforts be run more effective?
23. Any Other comments: .....

## APPENDIX IIb: INTERVIEW GUIDE FOR JCTR STAFF

1. Date: .....
2. Sex
  1. ☐ Male
  2. ☐ Female
3. Age
  1. ☐ Below 20 years
  2. ☐ 20-24
  3. ☐ 25-29
  4. ☐ 30-34
  5. ☐ 35-39
  6. ☐ 40-44
  7. ☐ 45-49
  8. ☐ 50-54
  9. ☐ 55-60
  10. ☐ Above 60
4. Where do you live?
  1. ☐ low density area
  2. ☐ medium density area
  3. ☐ high density area
5. Marital status
  1. ☐ Single
  2. ☐ Married
  3. ☐ Divorced
  4. ☐ Widowed
  5. ☐ Separated
6. Position/title at work: .....
7. For how long have you been working at the JCTR?
8. What do you want to achieve with the monthly JCTR *Basic Needs Basket*? (Goal)
9. In which way(s) are you involved in the dissemination of the JCTR *Basic Needs Basket*?
10. If you are not involved, why?
11. Who are the "key" or "main" strategic groups the JCTR targets in its dissemination of the *Basic Needs Basket*?
12. Do you think the JCTR is reaching them all in an effective manner?
  1. ☐ Yes
  2. ☐ No
13. Please explain.
14. What means (mediums) does the JCTR use to convey the *Basic Needs Basket* to its target group(s)?



15. Are the means (mediums) you use to send the JCTR Basic Needs Basket the most efficient (in terms of time)?

- 1. ☐ Yes
- 2. ☐ No

16. Why?

17. Are the means (mediums) you use to send the JCTR Basic Needs Basket the most cost effective (in terms of money)?

- 1. ☐ Yes
- 2. ☐ No

18. Why?

19. Mention some of the difficulties you encounter when disseminating the JCTR *Basic Needs Basket*.

20. What should be done to overcome these difficulties?

21. Where do you convey the JCTR *Basic Needs Basket* messages to your target group? (e.g., public meetings)

22. What do you see are the prospects for the JCTR *Basic Needs Basket* in the future?

23. How can the JCTR *Basic Needs Basket* campaign be disseminated more effectively?

24. What activities should be incorporated?

25. What dissemination means should be employed?

26. Which target groups require more attention?

27. How would you rate the means used in the dissemination of the JCTR *Basic Needs Basket*?

Score 1-5 means		1=poor, 2= fair, 3=average, 4=good, 5=excellent				
Means	1	2	3	4	5	
e-mail						
fax						
postal mail						
newspaper						
radio						
television						
magazine						
hand-to-hand						
word-of-mouth						
field researcher						
focal person						
strategic stakeholder						

28. What do you think should be done to improve the communication strategies currently being used by the JCTR?

29. Any other comments: .....

## APPENDIX III: LIST OF LOCATIONS IN LIVINGSTONE, LUANSHYA AND LUSAKA

### 1. Livingstone

Place	Classification
1. Dambwa Central	Medium
2. Dambwa North	Medium
3. Dambwa Site and Service	High
4. Linda	High
5. Eillane Britel	Low
6. Nottie Brod	Low
7. Highlands	Low
8. Malamba	Medium
9. Libuyu	High
10. Ngwenya (Malamba)	High
11. Zambezi (Sawmills)	High
12. Nakatindi	High
13. Malota (Malamba)	High
14. Kashitu (Dambwa)	High
15. 217 Area	Medium
16. Palmgrove (Victoria Falls)	Medium
17. Victoria Falls Area	Low
18. Railway compound	High
19. Airport	Low
20. Off Airport	Medium

### 2. Luanshya

Place	Classification
1. Mikomfwa	Medium
2. Roan township	Medium
3. Mpatamatu	Medium
4. Kawama	High
5. Kamirenda	Medium
6. Mine area	Low
7. Town centre (Luanshya boys area)	Low
8. New town	Low
9. Kwashuka (Mikomfwa)	High
10. Zambia compound	High
11. Roberts (Mikomfwa)	High
12. Ndeke	High
13. Second class area (Chibolya)	Low
14. Buntungwa	High

### 3. Lusaka

Place	Classification
1. Mandevu	High
2. Matero	High
3. Kanyama	High
4. New Kanyama	High
5. Chazanga	High
6. Mandevu	High
7. New Chawama	High
8. Old Chawama	High
9. John Howard	High

10. New Kamwala	High
11. New Chilenje South	Medium
12. Chamba Valley	Low
13. Olympia	Low
14. Zingalume	High
15. Lima township	High
16. Ibex hill	Low
17. Roma township	Low
18. Garden site 4	High
19. Mtendere	High
20. Barlastone park	Low
21. Chilenje	Medium
22. Libala	Medium
23. Woodlands	Low
24. Woodlands extension	Medium
25. Nyumba Yanga	Medium
26. Kuomboka	Medium
27. Kamwala	Medium
28. Kabwata	Medium
29. Misisi	High
30. Kalikiliki	High
31. Leopards hill	Low
32. Chelston	Medium
33. Avondale	Low
34. Rhodes park	Low
35. Long-hectares	Low
36. Chaisa	Medium
37. Lilanda	High
38. Kaunda Square Stage 1	Medium
39. Kaunda Square Stage 2	Medium
40. Kalundu	Low
41. Chipata compound	High
42. Kalingalinga	High
43. Northmead	Low
44. Garden compound	High
45. Thornpark	Low
46. Ngwerere	High
47. Fairview	Low
48. Nipa area	Medium
49. Regiment	Medium
50. Makeni	Low
51. Lusaka West	Medium
52. Bauleni	High
53. Kabulonga	Low
54. Chainama	Medium
55. John laing	High
56. Ben Mwiinga	Medium
57. Emmasdale	Medium
58. Ng'ombe	High
59. Kamanga	High
60. Villa Elizabettha	Medium
61. Chibolya	High
62. Chilulu	High
63. Helen Kaunda	Medium
64. George compound	High
65. Kasama (Bauleni East)	Low

## APPENDIX IV: LIST OF INDIVIDUALS AND ORGANISATIONS CONSULTED

Town	Nature of relation with JCTR
<b>Luanshya</b>	
Emeldah Chungu	Field researcher
D. Sinkonde	Focal person
Peter D. Mufwaya	Focal person
<b>Livingstone</b>	
John Mwewa	Field researcher
C. N. Mitambo	Focal person
Anonymous	Focal person
<b>Lusaka</b>	
<b>(a) JCTR Staff</b>	
Innocent Ndashe	Project staff: Project Officer
Chris Petrauskis	Project staff: Research Officer
Muweme Muweme	Project staff: Coordinator
Peter J. Henriot	Director
<b>(b) Organisations</b>	
Evangelical Fellowship of Zambia	Stakeholder: Faith Based Organisation
USAID	Stakeholder: International Organisation
Civil Servants and Allied Workers Union of Zambia (CSAWUZ)	Stakeholder: Trade Union
Zambia Union of Financial Institutions and Allied Workers (ZUFIAW)	Stakeholder: Trade Union
Care International	Stakeholder: NGO
German Technical Cooperation in Zambia (GTZ)	Stakeholder: Partner/Donor
Zambia Daily Mail	Stakeholder: Print Media
Hot FM	Stakeholder: Electronic Media
National Savings and Credit Bank	Stakeholder: Quasi-government
German embassy	Stakeholder: Embassy

## **APPENDIX V: 2007 GUIDELINES FOR URBAN *BASIC NEEDS BASKET* FIELD RESEARCHERS**

The following guidelines currently provide direction to all Urban Field Researchers in the survey of prices for the *Basic Needs Basket*:

- The gathering of prices for the calculation of the cost of the *BNB* shall be done every month from *the same* identified retail outlets in each respective town.
- Due to variation in sizes of some *BNB* items (dry fish, tomato, onion, kapenta, greens, beans), the scale provided by the JCTR shall be used consistently and in the good judgement of each Field Researcher to record prices for accurate weights.
- Prices shall be collected *at all times* from the same identified brand names or types. The brands/types included in the survey should be a reflection of local preference (i.e., Mpulungu or Siavonga kapenta, Boom or Dynamo, etc.).
- In addition to collection of data for essential food and non-food items, prices shall also be collected for Other Additional Items (e.g., those appearing in section “C” of the *BNB*) related to transportation, education, health, etc. (e.g., all those appearing on the Collection Template)
- The Collection Template distributed by the JCTR shall be used to record prices from each retail outlet and prices of the additional items. Also, a separate sheet of paper shall be used to explain any qualitative information relating to price variations learned from marketeers or traders.
- Information shall be collected from the 25<sup>th</sup> to the 27<sup>th</sup> day of each month and shall be faxed or emailed to the JCTR on or before the 28<sup>th</sup> of each month. To ensure the timeliness of the survey, the JCTR shall send the logistical allowance by the 20<sup>th</sup> of each month.
- The calculation of the average cost of the *Basic Needs Basket* shall be done by the JCTR and 150 copies of the computed *BNB* will be mailed to Field Researchers within three business days following receipt of all the data.
- Field Researchers shall distribute the monthly *BNB* within their respective towns to Focal Persons and other strategic stakeholders.
- All brands and quantities within the essential food and non-food items shall be reviewed on a quarterly basis for variation in market preference or product availability. Electricity, housing, water and health fees shall be updated on a quarterly basis. The cost of education shall be adjusted on a yearly basis as new PTA fees are determined. Transport charges shall be reviewed to reflect changes as they occur.
- Quarterly meetings with the 7 Focal Persons shall be organised on a quarterly basis and a brief report shall be submitted to the JCTR detailing the highlights of each meeting.
- Field Researchers shall cooperate with the JCTR in conducting advocacy efforts in the respective *Basic Needs Basket* towns.
- A review workshop shall be held on an annual basis in Lusaka in conjunction with a national stakeholder forum.

**APPENDIX VI: DEMOGRAPHIC CHARACTERISTICS OF RESPONDENTS**

**Table 2.4: Percentage Distribution of Respondents by Sex and Age-Group**

<b>Sex/Age-Group</b>	<b>Percent (%)</b>
<b>Sex</b>	
Male	42.0
Female	58.0
Total	100.0
<b>Age Group</b>	
Below 20	00.0
20-24	18.0
25-29	18.0
30-34	16.0
35-39	08.0
40-44	10.0
45-49	14.0
50-54	10.0
55-60	05.0
61+	00.0
No response	01.0
Total	100.0

**Table 2.5: Percentage Distribution of Respondents by Marital Status and Household Size**

<b>Marital Status/Household Size</b>	<b>Percent (%)</b>	<b>Cumulative Percent (%)</b>
<b>Marital Status</b>		
Single	24.0	24.0
Married	62.0	86.0
Divorced	4.0	90.0
Widowed	9.0	99.0
Separated	0.0	99.0
No response	1.0	100.0
<b>Household Size</b>		
Less than 4	20.0	20.0
5-9	62.0	82.0
More than 10	17.0	99.0
No response	1.0	100.0

**Table 2.6: Percentage of Respondents by Education Background, Employment Status and Income Category**

Education/Employment/Income	Percent (%)
<b>Education Background</b>	
No formal education	5.0
Primary (grades 1-7)	18.0
Secondary (grades 8-12)	33.0
College	33.0
University	11.0
Total	100.0
<b>Employment Status</b>	
Formally employed	50.0
Self-employed	35.0
No source of income	4.0
Retired	7.0
No response	4.0
Total	100.0
<b>Income Category</b>	
No income	1.0
Less than 500,000 Kwacha	34.0
500,000-1,000,000 Kwacha	21.0
1,000,000-2,000,000 Kwacha	22.0
More than 2,000,000 Kwacha	18.0
No response	4.0
Total	100.0

## APPENDIX VII: RESULTS RATING SCALE

**Table 6.1: Results of the Rating Scale by Respondents**

Means	Poor	Fair	Average	Good	Excellent	No response
E-mail	69	8	4	5	3	11
Fax	74	11	2	1	0	12
Postal mail	27	24	20	7	11	11
Newspaper	19	24	19	23	5	10
Radio	9	3	14	49	16	9
Television	10	5	15	30	32	8
Magazine	41	18	10	16	6	6
Hand to hand	3	18	8	26	37	8
Word of mouth	7	13	5	20	45	10
Field researcher	6	10	23	34	17	10
Focal person	7	13	28	29	13	10
Strategic stakeholder	11	14	23	16	22	14

**Table 6.2: Lusaka**

Means	Poor	Fair	Average	Good	Excellent	No response
E-mail	1	0	1	2	5	1
Fax	2	0	3	1	0	4
Postal mail	1	3	1	0	1	4
Newspaper	1	2	0	4	1	2
Radio	2	0	0	3	2	3
Television	2	0	0	3	2	3
Magazine	1	1	0	4	0	4
Hand to hand	1	2	0	2	1	4
Word of mouth	2	1	1	0	2	4
Field researcher	2	0	1	1	1	5
Focal person	1	1	1	2	1	4
Stakeholder	2	0	0	4	0	4

**Table 6.3: Luanshya & Livingstone**

Means	Poor	Fair	Average	Good	Excellent	No response
E-mail	0	0	0	1	2	3
Fax	0	0	0	1	2	3
Postal mail	1	0	1	1	0	3
Newspaper	0	1	0	1	1	3
Radio	0	0	0	2	1	3
Television	0	1	0	1	1	4
Magazine	0	1	0	1	1	3
Hand to hand	0	0	1	0	2	3
Word of mouth	0	0	0	1	1	4
Field researcher	0	0	0	1	1	4
Focal person	0	0	0	1	2	3
Stakeholder	0	0	0	1	2	3

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