



Toolkits

DEVELOPING A USER-FRIENDLY K4HEALTH TOOLKIT

K4Health Toolkits are comprised of key information resources pertinent to a particular global health topic. Toolkit users will find these resources primarily in one of two ways:

1. By searching for specific keywords in the search bar.
2. By browsing for relevant content through the Toolkit's navigation system.

The Toolkit navigation system employs a vertical main menu on the right with subcategories embedded between the main navigation options in a tree-like structure (see image below). Each section of the Toolkit is introduced with concise, informative text that sets the stage for the topic, explains its importance, and indicates the types of resources included in that section.

This document offers guidance on developing a Toolkit that is useful and user-friendly. Key steps for the Technical Working Group are to:

1. Determine the scope of the Toolkit.
2. Identify and select information resources.
3. Organize those resources into logical categories—that is, create the navigation system.
4. Write landing page text for each section of the Toolkit.
5. Reach technical consensus that the Toolkit is ready to publish.

In addition, the TWG might also identify knowledge gaps in the process and decide to develop new materials to fill those gaps.

The screenshot shows a web page for 'Service Delivery' within the 'Family Planning and HIV Services Integration' toolkit. The page features a main heading, introductory text, a photograph of a healthcare worker with a patient, and a list of key points. A dark blue sidebar on the right contains a navigation menu with options like Home, About, All Resources, Rationale, Policy, Training, Service Delivery (selected), Counselling Tools & Job Aids, Guidelines & Reference Materials, and Program Management. The top of the page includes a breadcrumb trail and links for 'TOOLKIT SITEMAP' and 'FEEDBACK'.

1. Determine Scope of Toolkit with Audience Needs in Mind

Deciding on the scope of the Toolkit is one of the first steps the steering committee will undertake to help inform the structure and content of the Toolkit. Generally, the steering committee should attempt to curate a comprehensive collection of relevant resources while avoiding information overload.

Considerations include:

- **Needs of the intended Toolkit audiences.** What do the intended audiences need to perform their jobs? If the scope of the Toolkit is too narrow, audiences will need to visit other sites to find the information and tools they need. If the scope is too broad, the resources included in the Toolkit might not be practical and relevant to their daily work.
- **Expected size of the Toolkit collection.** There is no set standard for the size of a Toolkit collection. It depends on the nature of the topic and on the needs of the intended audience. Experience has shown that 8 to 10 main sections is practical and that roughly 20 documents per main section (5 to 10 per down-level page, if applicable) seem to offer a fair degree of depth. This translates to an average of about 200 documents per Toolkit. Some Toolkits will require more documents and some fewer.
- **Purpose of the Toolkit.** Toolkits provide audiences with a range of quality resources from trusted organizations on a particular global health topic. However, sometimes the K4Health Toolkit Application is used to house a project- or country-specific resource center. The Toolkit Application can also be used to repurpose existing information packages, offering a fresh format and additional dissemination channel to reach new and wider audiences.

2. Identify and Select Information Resources for the Toolkit

Develop criteria for selecting resources. The steering committee should develop criteria to guide the selection of resources. For example, materials included in the Toolkit should be:

- Relevant, reliable, and useful for key audiences. For example, a synthesis of peer-reviewed research on a particular topic might be more practical and useful to program managers than direct access to the journal articles themselves (or the abstracts).
- Up-to-date
- Evidence-based and scientifically accurate
- Exemplary program and country cases that highlight topics addressed in the Toolkit
- Easy to understand (not overly technical)
- Freely available (full-text) online
- Adaptable to various local contexts, whenever appropriate
- Relatively small file size so that Toolkit users with limited or slow Internet access can download in a reasonable amount of time. It takes a user with a slow dial-up connection 3 minutes to download a 400kb document and 10 minutes to download a 1.5MB document (see table below). To make it easier for users to access larger documents, break them into smaller

sections and upload the sections separately. More strategies for reducing file sizes can be found at www.aptivate.org/webguidelines/Downloads.html.

Bandwidth (kbps)	Connection Type	Download Times		
		for 100kB	for 400kB	for 1500 kB (1.5MB)
2000	Broadband connection in developed world	0.4s	1.6s	6s
56	ISDN (dial-up) connection	14s	57s	4 minutes
20	Slow dial-up connection	40s	3 minutes	10 minutes
10	Heavily shared connection	80s	5 minutes	20 minutes

Source: Web Design Guidelines for Low Bandwidth (www.aptivate.org/webguidelines/Downloads.html)

Identify relevant resources. Many channels can be used to find quality, relevant information and tools.

- TWG members will be familiar with key resources on the Toolkit topic, both within and outside of their own organizations.
- The bibliographies of selected resources might reveal additional relevant publications.
- Conduct searches on the Web and in databases. PubMed, Medline, and SCOPUS provide access to journal articles but exclude handbooks, guides, fact sheets, tools, job aids, and grey literature. Sources for these practical materials include:
 - **POPLINE** (<http://www.popline.org>): The world’s largest database on reproductive health, POPLINE provides access to more than 350,000 carefully selected publications and resources related to family planning and reproductive health. Many documents—including scientific, technical, and programmatic publications as well as unpublished documents and project reports—are unique to the collection and unavailable elsewhere.
 - **Development Experience Clearinghouse (DEC)** (<https://dec.usaid.gov/>): The largest online resource for USAID-funded technical and program documentation, DEC has more than 70,000 documents available for download.
 - **World Health Organization’s Institutional Repository for Information Sharing (IRIS)** (apps.who.int/iris/): This database provides WHO’s information products free of charge in digital format. Its content is searchable in multiple languages.
 - **Photoshare** (www.photoshare.org): Developed exclusively for nonprofit use, Photoshare is a leading editorial photograph collection that showcases



A mother and child in Tete, Mozambique. © 2011 Arturo Sanabria, Courtesy of Photoshare

international health programs in action and the people they serve. More than 17,000 images are available upon request and free-of-charge. Photos provide an important visual element on the Toolkit pages.

- **Websites** of key organizations whose work is relevant to the Toolkit topic

Reaching Global Audiences with Diverse Languages

TWGs are encouraged to provide Toolkit users with foreign-language versions of resources whenever possible. Multiple language versions of a resource (English, French, and Spanish) can be added to the resource record so that Toolkit users can easily access all language versions from the same location.

Google Translate is available for automated translations of the Toolkit landing pages. It is also possible to create a Toolkit in a foreign language. For example, a Nutrition Toolkit developed in Bangladesh is available in Bengali and an Adolescent Reproductive Health Toolkit developed in Indonesia is available in Bahasa Indonesia.

3. Identify Main Concepts and Organize Resources Accordingly

The information in the Toolkit must be organized into logical categories. Experience has shown that topic-specific categories (for example, policy, service delivery) generally work better than audience-specific categories (such as program managers, service providers) because different audiences might want to access the same materials. For example, the primary audience for job aids is service providers; however, program managers are a secondary audience because they incorporate the job aids into providers' training and work flow.

Creating an intuitive and simple organizational structure that is easy for users to navigate is critical to helping users find the information they need. Some rules of thumb include:

- **Use short navigation paths** that get users where they need to go in the fewest number of clicks. In particular, users with a slower Internet connection cannot easily click from page to page so important information should be available within two or three clicks of the home page.
- **Use clear and intuitive labels**, based on the user's perspective and terminology. By looking at the navigation menu, users should be able to determine exactly where they need to go to access the information they seek.
- **Use mutually exclusive categories** to provide clear distinctions among the navigation options.
- **Use consistent level of granularity**, or breadth of content, across the navigation options. Let's say, for example, that you have organized the content of your Toolkit into six main categories, which appear on the vertical main menu. The categories should generally be similar in depth, or

level of focus. In his book *Designing Web Navigation*¹, James Kalbach gives the following example:

Consider how these options reflect different levels of granularity: white roses, red roses, flowers, bouquets, and sunflowers....In this case, the mix of granularity doesn't add up. Of course, in some disciplines, there may be a narrow focus on a specific area which receives disproportionate weight when compared to other topics. A flux in granularity may be natural in these cases.

How To Organize Your Information

There are several ways to approach the organizational process. In a **top-down** approach, you identify the broad concepts and then organize your resources into those categories. In a **bottom-up** approach, you begin by examining your resources to identify the main concepts your Toolkit will address. Many groups use a **hybrid** approach in which some concepts are identified from the beginning, and others emerge upon reviewing the collection of resources.

Card sorting is a useful exercise to guide the organization of content. In a card sorting session, participants are asked to organize content in a way that makes sense to them.

In an **open card sort**, participants organize cards, each labeled with a topic of interest, into groups that make sense to them and then name each group. For example, a participant in an open card sort for a Community-Based Family Planning Toolkit may create cards for “community-based distribution,” “mobile services,” “community depots,” and “engaging the private sector,” and group all of these under the main category of “community-based family planning strategies.” An open card sort would be helpful in structuring the entire Toolkit—that is, to define the main headings and subheadings in the navigation menu.

In a **closed card sort**, participants sort items into pre-defined categories. This is useful when the main Toolkit headings, or sections, have been determined, but more guidance is needed on how to organize the subheadings and resources within those sections.

For further instructions and information about card sorting, please visit:

Usability.gov, “Card Sorting.” www.usability.gov/methods/design_site/cardsort.html
Usability Net, “Card Sorting.” www.usabilitynet.org/tools/cardsorting.htm

Card sorting can be conducted face-to-face with a small group of participants and paper and pen, or online with a larger group of participants and at their own leisure. Two popular online card sorting tools that you can use for free with up to 10 participants (or pay for a single study or on a subscription basis):

- WebSort (www.uxpunk.com/websort/)
- OptimalSort (www.optimalworkshop.com/optimalsort.htm)

¹ Kalbach, James. *Designing Web Navigation*. Sebastopol: O'Reilly Media, 2007.

4. Write Landing Page Text

Every landing page of the Toolkit should have text that orients the user to the topic and the Toolkit itself. Not every visitor will see the home page of the Toolkit. Many will be led to a particular page or resource record within the Toolkit from a search engine. Ensuring these visitors (1) find what they are looking for and (2) understand what site they are on will encourage repeat visits.

Most people spend mere seconds skimming a Web page for the information they seek. To successfully share information through your Toolkit, follow these tips on writing effectively for a Web-based audience.

- **Write the information your users need.** Before you begin drafting your landing page text, answer this question: If you were a new visitor to the Toolkit, what would you want to know? Think about what Toolkit users want to know about the Toolkit topic and about the Toolkit itself, and write that information only.
- **Less is more.** Most people scan Web content for headings, bolded key words, and bullet points rather than reading word-for-word. Make key information easy to spot (for example, by placing it at the top of the page, followed by the details). Omit non-essential information.
 - **Keep landing page text concise.** Use no more than 300-700 total words on any Web page. If a longer piece is needed on a particular topic, consider drafting it in the form of a publication that can be uploaded to the Toolkit. As a general rule, aim for half the word count of conventional writing.
 - **Condense sentences.** Vary the length of your sentences, but try to keep average sentence length relatively short. Readers have less patience to read long sentences on the Web than they do on paper.
 - **Highlight key words** by using bold or italic font. But overuse of these features is distracting and unprofessional, so use bold and italic font sparingly.
 - **Make headings and subheadings meaningful.** Headings and subheadings should tell readers exactly what information they can expect to find in the text that follows.
 - **Use bullet points** to organize key ideas, break up text, and make text more scannable.
 - **Stick to one idea per paragraph:** Readers will likely miss additional ideas if they are not captured in the first few words of the paragraph. Paragraphs should only be 2-4 sentences long.
 - **Use high-quality photos and graphics** to illustrate the concepts in your Toolkit. Photoshare is a great source for diverse high-quality global health images.



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- **Establish credibility.** There are several simple ways to show that your Toolkit is a trustworthy source of information.
- **Write well.** Use correct grammar and spelling, organize your ideas carefully, and have the steering committee review your Web content for clarity and grammatical and scientific accuracy.
 - **Use links wisely.** Linking to relevant sites demonstrates that the developers of the Toolkit are familiar with and exchange information with the other leaders in the field. Also, links stand out, making the text easier to scan. It is important to clarify to what you are linking. For example, a link to [WHO's latest guidance on medical eligibility for contraceptive use](#) is more meaningful than a link that says to click [here](#).
 - **Avoid technical jargon, acronyms, and complex or subjective language.** Not all Toolkit users are familiar with the terminology and acronyms that your organization(s) commonly use. The target audience for K4Health Toolkits includes policy makers, program managers, and service providers in developing countries, whose first language might not be English. Use language that is clear, consistent, and objective. Write about your topic so that even someone who is unfamiliar with the issue can understand and absorb the information.
 - **Provide examples.** Examples help illustrate key concepts and reinforce your experience and expertise. Users are often more drawn to examples than explanatory text.

5. Develop Technical Consensus

Throughout the Toolkit development process, steering committee members can communicate with each other and the larger TWG using a number of channels. Excel workbooks, Google Drive (<https://drive.google.com>), previously called Google Docs, and Dropbox (<https://www.dropbox.com>) are commonly used to track and collect the content inventory. Some steering committees find it easiest to communicate and collect materials by email while others prefer to share ideas and review progress by phone or using virtual communication tools such as Skype (www.beta.skype.com/en/) or GoToMeeting (www.gotomeeting.com/fec/). While an occasional face-to-face meeting can be valuable, the many free communication tools available globally reduce the need to spend time and resources attending meetings in person.

When the Toolkit is ready for review, TWG members and others can visit the password-protected site and provide feedback via email; online meetings using tools such as Adobe Connect (www.adobe.com/products/adobeconnect.html), GoToMeeting (www.gotomeeting.com/fec/), or join.me² (<https://join.me>); or free online survey tools such as SurveyMonkey (www.surveymonkey.com). Once feedback from the TWG has been considered and incorporated into the Toolkit, the Toolkit is ready for publication.

² Join.me is a free screen sharing tool for “meetings on the fly.” Up to 250 viewers can join the online conference, participants can share controls of the mouse, and Internet calling for audio can be integrated. It’s a very simple, easy-to-use, and free tool available at <https://join.me/>.

Other Steps in the Toolkit Development Process

K4Health offers guidance on completing each step of the Toolkit development process. These guidance documents can assist you with your next steps and with ongoing collaboration to promote, maintain, monitor, and evaluate the toolkit:

[How and When to Establish a Technical Working Group](#)

[Promoting and Disseminating the K4Health Toolkit](#)

[Updating the K4Health Toolkit](#)

[Monitoring and Evaluating the K4Health Toolkit](#)

Be sure to also take a look at our templates and other tools to help throughout the Toolkit-building process. These include:

- [a sample agenda for an initial Toolkit steering committee meeting](#)
- [an Excel workbook for organizing Toolkit resources](#)
- [a sample online survey](#)
- [a form to obtain feedback about Toolkits in development](#)