

Visual Guidance for Humanitarian Needs Overviews, Humanitarian Response Plans and Updates

Humanitarian Programme Cycle

June 2020

Before you Start

This document provides practical guidance for information management officers and designers on how to populate and adapt the Humanitarian Needs Overview (HNO) and the Humanitarian Response Plan (HRP) templates for the 2020 Humanitarian Programme Cycle.

It should be consulted in conjunction with the rest of the package: the InDesign and Illustrator templates and assets, the annotated templates and the step-by-step guide.

Instal the OCHA corporate fonts

The layout of the HPC products complies to the new OCHA visual identity and uses Roboto as the main font. Three subsets and its various weights are included in the assets folder. Specific paragraph and character styles are used in the InDesign but other styles might be created if the layout requires.

Avoid to use any other font than Roboto, namely Avenir Next, OCHA's previous corporate font or Arial, OCHA's corporate font for basic users.

Please refer to the OCHA graphics stylebook for specific guidance on Arabic fonts.

Use the new humanitarian iconset

The new version of the humanitarian icons is included in the assets folder. It features a larger array of humanitarian actions, operations and items, and the new cluster icons. This iconset is updated constantly and available here: <https://humanitarian.atlassian.net/wiki/spaces/OCHAVisual/pages/642547717/Assets+Templates>. Guidance to create new icons is also included in the assets folder.

Please avoid using OCHA's humanitarian illustrations and previous versions of the humanitarian icons.

Consult OCHA's available design guidance

Consult the OCHA graphics stylebook and visual tips included in the assets folder. Further guidance and resources are available on the OCHA Visual website: <https://humanitarian.atlassian.net/wiki/spaces/OCHAVisual/pages/632193025/Design+Guidance>

and the IM toolbox:

<https://humanitarian.atlassian.net/wiki/spaces/imtoolbox/overview>

Good Practices

Whilst not mandatory, the adherence to these good practices is strongly recommended to achieve an optimal and coherent result across the whole suite of HPC documents from all the OCHA operations.

1. Setup

1.1 Software

InDesign - for layout and charts - and Illustrator - for maps and advanced charts - are required for the HPC products.

The InDesign package is best used with the latest Adobe CC Suite, but runs on older InDesign versions. If that is the case, use the legacy file with *.idml* extension.

1.2 Setting up the document

OCHA standard paper size is A4. Margins for this document are: Top 18 mm, Bottom 27 mm, Left 18 mm and Right 18 mm. Bleed is 3 mm.

For printed versions, make sure to have a total page count that is multiple of 4, for example, 56, 60 or 64.

1.3 Exporting the document

Consider the following export settings depending if the document is for web or print. For document archival, use the 'Package' option on InDesign.

Web

Format: Adobe PDF (Interactive)

View: Fit page

Layout: Two-Up (Cover Page)

Compression: JPEG (Lossy)

JPEG Quality: High

Resolution (ppi): 144

File should ideally be smaller than 6 MB.

Print

Format: Adobe PDF (Print)

Standard: PDF/X-1a:2000

Compression: 300 ppi

Image Quality: Maximum

Printer Marks: Select all

Bleed: 4 mm

Color Conversion: Convert to destination

Color Destination: Document CMYK

1.4 Print specifications

Paper specifications are subject to availability of stock and might differ from printer to printer. The specifications below are a good balance of quality and cost. Please consult your printer for any other available option.

Format: A4

Colour: CMYK

Paper (cover): Cyclus Print white coated, 250-300 gm²

Paper (interior): Cyclus Print white uncoated, 130 gm²

Perfect binding

2. Editing

Styles are a helpful way of streamlining and simplifying the design process while achieving coherence across all documents on all operations. Be mindful that the HNO/HRP you are producing might be worked on simultaneously or later by other colleagues - adhering to common styles ensures shared understanding of the base elements and layout, a less time-consuming production process, greater efficiency and synergies with HAOs, IMO's and designers in the editing team and across OCHA.

All elements of the document are built using the InDesign Character, Paragraph, Table and Cell Styles for ease of use. Bar and line charts are to be created manually on InDesign (using proportional sizes) but can be created on Illustrator replicating the same style. Guidance for maps is included inside the Illustrator files. Stick to the styles as much as possible and create new styles only if the data requires.

2.1 Cover

Keep the response plan title as it is, in two lines and edit the country or region on the third line. On the right text block, edit to reflect the plan's year. Multi-year plans should reflect the full period of the plan, for example, 2020 - 2022.

Pick a picture following the guidelines for pictures on point 3 of this document. For advanced users, please use the model from 'AdvancedCover.indd' and copy and paste it into the master file. Note that this cover works with portraits of people with a single main subject. It overlays a small part of the picture on top of the white bar, without covering the title of the document.

For countries/regions/emergencies with more than 14 characters (for example, Central African Republic), add a fourth line, split the title across the two bottom lines and move the picture down, ensuring the same white space is kept.

For revised HRP's, edit the text that currently reads 'Issued on Month 2019' to 'Revised on Month 2020'

Please contact the Assessment, Planning and Monitoring Branch (APMB) for guidance on cases where the response plan type differ from the standard 'Humanitarian Response Plan'.

2.2 Grid and Margins

Two sets of grids are available on the layer tab: two-column and three-column grid. For any given page, choose the one that suits the content better. Align the elements to the grid whenever possible and mind of not placing elements outside the margins. Avoid overcluttering elements in one page - enough white space allows the eye to rest, enhanced rythm and better readability.

2.3 Master Page Styles

The master pages sets the common elements for all the document: the running headers and the page numbers.

2.4 Character and Paragraph Styles

Main styles for text are to be found under the Section and Sub section, and Captions Paragraph style groups. Captions can be placed on the page of the picture or on the other page of the spread if the space doesn't allow. End notes are created automatically from the Title style and may require manual tweaking using the Character styles. Styles for Acronyms, weblinks and contextual footnotes are also available.

2.5 Table and Cell Styles

The documents rely heavily on tables that range from topline figures summaries to multi-column and row tables, tables with overlay of bar charts and matrixes. Be mindful of what elements are edited under Table Styles or Cell Styles. Text on tables is edited by Paragraph Styles.

2.6 Chart Styles

While not mandatory, the categories shown on the templates should be the minimum information available. The use of horizontal bar charts is highly recommended as it is the visualisation method that allows more information and best readability. Bar and line charts are to be created manually on InDesign - set out your data and atribute proportional sizes to the bar, making use of InDesign grids. More complex styles can be created on Illustrator replicating the same formats, sizes, grids and colours.

2.7 Map Styles

All maps should be presented inside a square frame. This ensures all maps are displayed coherently across all HPC documents whether the shape of the country or region is horizontal or vertical. Adhere to the style of the map as in any map Illustrator file included in the package. Use the eyedropper tool to match the style from the template to your map.

Use circles to depict numbers (people, organisations and events) and color areas to depict ranges (severity of needs and affected areas).

Whatever administrative level you use, it's recommended you depict the following elements: borders, main rivers/seas, neighbouring countries (in grey), district names, country capital. For smaller maps, i.e., one-column maps, depict only borders, neighbouring countries (in grey) - don't use labels, unless relevant.

To improve readability on busy areas, use detailed area boxes, as shown on the template example.

Contact the Digital Design and Multimedia Unit - Strategic Communications Branch for further guidance.

2.8 End Notes and Footnotes

End notes are strongly recommended over footnotes, although the use of contextual footnotes, such as disclaimers, is encouraged.

3. Pictures

Strong and diverse pictures will invariably help to improve the quality of OCHA products and this HNO/HRP is heavily illustrated with them.

3.1 Planning and themes

Planning ahead what kind and amount of pictures to include is of great importance to achieve a good result. Frame the creation of a picture archive as a year-long on-going process and cover the themes and population groups that will be highlighted in the documents, such as:

- Crisis-specific themes: displacement, gender-based violence, natural hazards, ...
- Crisis-specific population groups: diverse sets of gender/age/disability, farmers, elders, host communities, ...
- Environment, infrastructure and technology: disaster contextual shots, shelter, health and education facilities, multi-purpose cash in use, ...
- Humanitarian workers and donors in action: aid distribution, logistics and handling, collection and analysis of data, building of humanitarian networks, ...

3.2 Sources and archival

Use SmugMug <https://ocha.smugmug.com> as your main source for photography and make sure to upload regularly any new material to the platform, properly captioned, credited and tagged.

In the absence of adequate quality pictures from your own archives, reach out to other UN agencies, NGOs and donors on the ground to share access to their archives and ask for permission to use their pictures.

3.3 Subject

Choose your main subject: Rather than having general pictures, with several information in one image, is better to choose one main subject: one person or small group, couple, mother and son, one single building or infrastructure. It can complement it with groups of people or general pictures. But is crucial to have close caption pictures, portraits, that can be more impactful and catch the attention instantaneously. Even if the picture is showing aid distributions, is better to have one single person receiving the goods than a large group. The photos chosen should be those that best illustrate the results and impact of the action and should match any written information submitted.

Seek out images of beneficiaries that express self-reliance and hope. It's important to show aid as a collaborative process between affected populations, governments and the international community, rather than depicting those in need as victims. Ask and keep a copy of image use authorisation from people photographed

3.4 Ethics and cultural awareness

Don't depict suffering, gore, nudity, violence or death. Avoid depicting undignifying or prohibited imagery by being aware of cultural standards on certain countries and/or regions.

3.5 Captions, credits and metadata

Give context to the picture by writing a caption. Use the persons names only if allowed. Always include the location where the picture was taken - at a minimum, the village and the country; ideally, village, region/district and country. Credit properly - use the format: Photo: Organization / Photographer.

3.6 Quality

Don't use black and white pictures, as it might be interpreted as an artistic shot and distract from the content. Avoid distorted or out of focus images. Do not shrink the image until it loses impact to fit more text. Above all, do not squeeze or stretch the image when resizing. Avoid hardwriting the credits in the picture as it may be reused in other products in the future.

Collect professional images in high resolution. A minimum width of 3,000 pixels is advisable to avoid printing images below 150 dots per inch.

Checklist

Page

- Size A4
- Number of pages is a multiple of four (for printed versions only)
- Correct bleed and margins used
- Compliance to export options

Editing

- No mix of languages
- No placeholders from original template
- No double spaces
- No orphans / widows
- Acronyms spelled out on first mention
- Acronyms added to annex
- Endnotes reviewed
- Hyperlinks working
- Final table of contents reviewed

Layout

- Cover as in template
- No elements outside of margins
- Only two colours (including shades) plus black used
- Enough white space around elements
- Roboto (Condensed and Slab) strictly used
- Arial or Avenir Next (discontinued) used
- New humanitarian iconset used
- Old humanitarian or non-OCHA iconsets used
- InDesign character, paragraph and table styles used
- Map style compliant with template (square format, colours and elements style)

Photography

- No black and white pictures
- No distorted pictures
- Pictures with proper resolution
- Culturally-aware pictures used
- Captions and credits added (format: Photographer/Organization)

Quality Control / Peer Review

- Adhered to the guidelines and template as much as possible
- Consulted other HNO/HRPs for coherence
- Reviewed by OCHA designers and/or IM communities
- Reviewed by APMB
- Peer reviewed both by technical and non-technical staff

Dissemination

- Digital documents uploaded to HRinfo, Reliefweb and Humanitarian Insight
- Relevant and agreed datasets uploaded to HDX
- Pictures uploaded to SmugMug