Al Canada Digital Communications Manual Documentation

Release 0

Jackson Couse

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Getting Started

1.1 Introduction to Digital Publishing

Media literacy is expensive and valuable. It takes constant dedication to maintain our information systems and an understanding of the media. At the same time, we live in a very large country and the need for a solid publishing system is paramount.

The branch is a small organization. Historically, we've invested in subject-expertise and community-building activism. We have relied on a motivated, coordinated, and educated corps of activists and volunteers, many who operate with great autonomy.

The publishing cycle has sped up considerably with the advent of digital networks. The time from decision in London to deadline in Ottawa can be extremely short. Getting our work online consistently and reliably is real a challenge.

It takes a strong plan to make content, get it online smoothly, ensure its relevance, and keep everything up-to-date. This manual is a key part of that plan.

1.2 Key concepts

If you come from a paper-based publishing environment the digital paradigm is a shift from what you are used to. You will have to drop some of the assumptions you have about how to publish. It might be painful, but that's ok! There is big upside to digital.

The technical foundation of our publishing ecosystem are simple, yet powerful, standardized ways of working, like content management systems and collaboration tools. These tools help organize stories for publishing online. They work by providing baseline templates (a schema, in geek-speak) for creating metadata (that's data about data) and content (words, pictures, etc) that our editors, publishers, and readers can quickly and easily spread online.

Structured content is the key part of our long-term publishing strategy. Structured content is writing in such a way that little "chunks" of information can be pulled from your documents and easily online. This is a fundamental shift from the locked-in metaphor of words on paper. Structured content makes content infinitely recycleable, re-combinable, and persistent.

1.3 First steps

Congratulations, you have started the first step: this manual!

- *Digital Publication Strategy and Tactics* provides a background on how we use digital communications tactics to achieve our strategic goals;
- · Coordinating Digital Publication outlines how we make decisions and organize our daily workflow;
- Implementing the Digital Publishing Work-flow details the work of executing editorial and technical aspects;
- Digital Communications Systems covers the core technologies and business rules of the digital publishing system.

Getting comfortable with the publishing system starts with getting to know your co-workers. DigitalComs can be a fast-paced place with little room for error (aside: we accidentally announced Nelson Mandela's death, oops!) at times. The Strategist, Coordinator, and Editorial and Technical Workers need to work in close unison, so you'll need to build up some trust.

The people responsible for media-relations, the library, and Information Technology are also important. Get to know these people, too. You will rely on them to help you with project work.

Note that this manual does not contain is system-specific documentation. Please consult the manuals for the information system you are using for detailed information.

Digital Publication Strategy and Tactics

2.1 Human rights framework

2.1.1 Goals

Amnesty International works towards universal human rights. We are a global movement of over 3 million people committed to defending those who are denied justice or freedom.

Goals for the branch are set by Management and the Strategy Unit in coordination with International Secretariat. These broad goals are set out in a number of documents, including the Branch Plan and the Integrated Strategic Plan. DigitalComs contributes to the creation of these goals by providing feedback, context, and intelligence.

DigitalComs find the best ways to achieve these goals using communications strategies and tactics. Sometimes interpretation, clarification, or re-framing of goals is needed.

We then use measurement and evaluation techniques to see how well we have achieved our goals.

2.1.2 Strategies

People and organizations use the words "strategies" and "tactics" in different ways. Understanding what they are and how they are connected is important to the success of your work.

To achieve a goal, you need a strategy. To carry out your strategy, you need tactics. Tactics are the specific actions that help you fulfill your strategy so you can achieve your goals.

• from What Are Strategies at http://newtactics.org

Use of the Strategic Effectiveness Method for human rights is encouraged:

- 1. **Identify the problem**. What do you want to change? What human rights violation would you like to address?
- 2. Build a common vision in order to **determine goals**. What do you want to be different in the future? What is inspiring you in your work? How will you know you are successful?
- 3. **Define the context**. How do you evaluate your situation? What individuals and groups are connected to this problem? How do the individuals and groups relate and interact with each other? What are their goals?
- 4. Explore and **select the tactics** to help you achieve your goal. What is your focus? Which tactics can have the greatest impact?
- 5. **Develop a plan** of action. How are you going to put the tactics together in a plan so you can achieve your goal?

2.1.3 Tactics

Our practice builds on strategic and tactical thinking from several sources:

- · Little Yellow Book, from an Amnesty International
- New Tactics for human rights
- 10 Tactics
 - 1. mobilize people
 - 2. witness and record
 - 3. visualize your message
 - 4. amplify personal stories
 - 5. just add humour
 - 6. manage your contacts
 - 7. use complex data
 - 8. use collective intelligence
 - 9. let people ask the questions
 - 10. investigate and expose
- 10 Tactics Remixed
- 10 Tactics Unstitched

Tactical goals:

- 1. Public & civil society organization engagement
- 2. Media engagement
- 3. Engagement by key actors; allies; second governments; diplomats; IGOs
- 4. Key target decision makers' attitudes and engagement with our positions
- 5. Introduction, amendment, repeal of laws policies & standards
- 6. Actual implementation of laws policies & standards
- 7. Accountability towards implementation
- 8. People able to claim rights
- 9. People able to enjoy rights

2.2 Content Focus

Maintaining relevant critical content is an ongoing struggle. To focus our efforts, we look for three key elements in content: **relevance** to the Critical Pathways, social/political and news **significance**, and **importance** to the movement.

2.2.1 Critical pathways

Amnesty International's Integrated Strategic Plan outlines the parameters of our human rights work. Two other pieces map how we achieve the human rights goals of the Plan: the 12 Critical Pathways (which define the thematic areas of human rights focus), and the identification of country priorities.

- 1. Armed Conflict
- 2. Death Penalty
- 3. Criminal Justice
- 4. Ending Discrimination
- 5. Freedom of Expression
- 6. International Justice
- 7. Corporate Accountability
- 8. Maternal health and Sexual and Reproductive Rights (SRR)
- 9. People on the Move
- 10. Security and Human Rights
- 11. Slums
- 12. Control Arms
- 13. Indigenous peoples (priority for Canada)

2.2.2 Current events

Part of being relevant is responding to "news pegs." A news peg is a subject that reflects "the rhythms and accents of the news cycle, events beyond your control that are of societal significance and coincide with when the public tunes in to find information."

We take a proactive approach to identifying news pegs on the horizon and incorporating them into our publishing schedule. A weekly "What Up?" meeting helps set priorities for the next seven days, and we respond to issues as they arise. This is done in coordination with media-relations staff.

2.2.3 The Movement

Amnesty International Canada is part of a global movement. We are responsible to our membership, aware of emerging human rights situations, and charged with delivering of Amnesty International's global campaigns. DigitalComs plays a key role in facilitating International membership, solidarity, and activism

2.3 Outcomes

2.3.1 Measurement

We A/B test our content as much as possible. We seek feedback from our internal clients, the target population for our work, and key stakeholders. We also set measurement parameters for our work *before* we begin.

2.4 Evaluation

Working in a human rights framework means measuring our success against real-world outcomes, some of which are hard to measure. Nonetheless, our tactical goals all lead to the universal adoption and protection of human rights. We measure the success of our digital programs for the role they play in achieving our tactical goals.

2.3. Outcomes 5



Coordinating Digital Publication

This section describes how we create and organize content. Coordination is mainly about communicating and enforcing business practices, and is the responsibility of the Coordinator.

3.1 Roles

Different people have different responsibilities and levels of direct access to publishing. We have a simple set of roles to define these relationships:

- · Unsolicited
- Casual
- · Semi-casual
- · Authenticated
- · Trusted
- Editor

The Coordinator mediates access to the means of publishing (e-newsletters, website, social media, etc.) depending on levels of trust a person has, the amount of content a person produces, and technical skill.

The Coordinator is the managing-editor of publications. This work might be shared with other managers, or sub-editors, but ultimately the Coordinator is responsible for overseeing the publications work-flow and whether an item is published or not. The Coordinator also makes sure overall tone, message, and material reflects the branch goals and standards. When new material is created, it is submitted to the Coordinator, who reviews and assigns the material for correction or publication.

The Coordinator oversees the Editorial Worker(s), collaborates with the Strategist, and is responsible to the Director of Communications and Marketing.

3.2 Story-based communications practice

The story is the basic unit - the "atom" - and organizing principle of our content system. A story can be told in many different ways, but the story is always the genesis of the need to publish. Like an atom, a story is a complete unit made up of a few simple parts that combine and relate to one another:

- Ideas what we want to communicate in our story
- Context where we want to communicate the story
- Assets the things we have to help us communicate the story

Working with content producers (such as members of Campaigns, Activism, and Marketing) the Coordinator discerns the ideas and context in a proposed story, assigns resources for the creation of assets, and sets a time-line for publication.

3.2.1 F.R.A.M.E.S.

FRAMES is a checklist of qualities that make a message effective:

 \mathbf{F} = Frame the issue: set the terms and define the stakes

 \mathbf{R} = Re-frame opponent's story and reinforce our frame: change the terms of the debate

A = Accessible to the audience: be specific when you craft your language, context, and values so that people will understand

M = Meme: memorable, easy to spread, resonant

S = Simple and short: get to the core of the issue

3.3 Catalogues and archives

A catalogue is a collection of stories. We use catalogues to communicate our stories in an organized manner. The website is one, public, example of a catalogue. Shared drives and asset banks are two of the private catalogues we use, among several. Healthy catalogues are essential to effective communications.

Think in terms of catalogues helps us sort our stories as independent units and as parts of collections. This means we can keep our content organized even when our priorities and our work changes. Healthy catalogues are an essential part of making our content searchable and dynamic.

An archive is a catalogue of "retired" material. Retired material still needs to be accessible for reference purposes but is no longer current. The website also has an archive function. In the case of online catalogues, archiving and retiring projects has important security implications. Archiving planning should be part of all content planning.

The Coordinator sets priorities for which parts of a catalogue take precedent and how content should be archived. Maintenance of the catalogue and archives is the shared responsibility of everyone in DigitalComs.

Implementing the Digital Publishing Work-flow

4.1 Overview

Implementation is broken down into two discrete, but deeply inter-related, jobs: editorial work and technical work. These jobs are done by (at least) two people.

4.2 Editorial Worker

4.2.1 Role

The Editorial Worker (EW) is part of the Digital Communications team, and reports to the Coordinator. The EW helps the Coordinator craft material for publication on various digital platforms. The EW can play several roles, including: producer, editor, copy-writer, and proof-reader. There may be multiple EWs on the communications team, with varying levels of responsibility and specialization.

The EW works closely with the Technical Worker (see below) to implement directives from the Coordinator and Strategist. The EW consults with the Technical Worker to provide practical feedback to the Digital Comms group on day-to-day publication needs.

Occasionally, when assigned by the Coordinator, the EW works with others in the organization to help develop material. This could include coaching or assisting program coordinators, activists, field-workers, interns, and volunteers to help develop digital assets for publication.

4.2.2 Systems

The EW interacts primarily with *words* and with *people* to facilitate the creation of effective messages. This work relies efficient collaboration and communication systems, including:

- project/task management tools
- collaboration tools (chat)
- · house style rules

- · editorial guidelines
- digital asset management tools (especially material review-and-revision workflow tools)
- digital publishing tools
- online content management tools

4.2.3 Tasks

Fundamentally, the work of the EW is to help get the "stuff" on the "thing."

This can include:

- Proof-read and edit content to ensure that messages and operations are coherent, re-enforce strategic communications plans and adhere to international Global Identity standards
- Assist the Communications team with entering content into the digital publishing tools and online content management tools
- · Assist in the maintenance of websites by reviewing existing content to make sure it is up-to-date and accurate
- Assist in the archiving of web content and websites
- Post content to social media channels
- Track and report online behaviour from new media activities
- Deploy and report on HTML e-mails and electronic newsletters
- · Produce digital graphics for website, social media channels, e-mails and e-newsletters
- Create marketing banners in Photoshop
- Resize, crop and sharpen digital photographs
- · Record audio and video interviews
- Assist in the development of tactical strategies to leverage and enhanced platform functionality
- Work with the Director of Communications and Marketing and the members of the Communications team to strengthen editorial policy
- Work with the Information Technology Manager and members of the IT team to the document digital communications systems
- Provide training and advice in the use the organization's web sites and social media platforms
- Develop and maintain documentation and learning resources for creators of digital content, social media and new media
- · Work with partners and external vendors when necessary

4.3 Technical Worker

4.3.1 Role

The Technical Worker (TW) is part of the Information Systems team and reports to the Information Technology Manager. The TW helps maintain and develop digital publication and communications platforms. The TW can play several roles, including: front-end developer, back-end developer, systems administrator, database administrator, and webmaster.

The TW works closely with the Editorial Worker (see above) to implement directives from the IT Manager. The TW consults with the Editorial Worker to provide feedback to the Information Systems group on day-to-day technical needs relating to digital publishing and communications.

Occasionally, when assigned by the IT Manager, the TW works with others in the organization to help develop their digital literacy and communication skills. This could include coaching or assisting program coordinators, activists, field-workers, interns, and volunteers.

4.3.2 Systems

The TW works primarily on *systems* and *processes* to facilitate efficient collaboration and publishing. The TW maintains and develops:

- project/task management tools
- · e-commerce tools
- · collaboration tools
- · web servers
- · databases
- · websites
- · archives
- · code repositories
- · digital publishing tools
- · online content management tools

4.3.3 Tasks

Fundamentally, the work of the TW is to help keep the publication and communications systems running smoothly safely.

This can include:

- Support the operation of digital publishing tools, online content management tools, and websites by maintaining and updating systems
- Apply information architecture(s) and metadata systems
- Maintain information collection and e-commerce platforms
- Assist in the archiving of web content and websites
- · Maintain of user roles and accounts
- Assist in the development of tactical strategies to leverage and enhanced platform functionality
- Work with the Information Technology Manager and members of the IT team to the document digital communications systems
- Provide training and advice in the use the organization's digital collaboration and publishing systems
- Develop and maintain documentation and learning resources for creators of digital content, social media and new media
- Work with partners and external vendors when necessary

4.3. Technical Worker

4.4 Best practices

4.4.1 Time management

Editorial and technical support is highly desirable at Amnesty International. Given limited budgets and ambitious goals demand will always exceed supply. Be careful about how you spend your time and efforts.

- Avoid meetings unless your presence is absolutely required
- Especially avoid standing/recurring meetings, debates, and large "check-in" meetings; these are for the benefit of talkers, not you your job is to report, inform, and get down to business
- If someone can speak on your behalf or deliver your notes at a meeting (probably your supervisor or manager) this is preferable
- Minimize all contact outside that sanctioned by your supervisor
- Do not entertain co-workers "showing up" to ask or demand things from you, even if done politely they must go to your supervisor for service and entry of the task into the task-management queue
- All work should be approved by your supervisor before you begin
- Editorial and technical bugs/fixes should go to your supervisor to decide priority
- · Make sure you have a quiet, uninterrupted place to concentrate and do your work

4.4.2 Pass phrases

The editorial and technical workers have more access to computer systems than most. With this access comes the heightened need for safety. Two-factor authentication is recommended:

a strong secret key = (something you have) + (something you know)

- prefer pass-phrases over pass-words, the dice method is recommended
- hardware keys, like USBs or your cellphone, can add another level of security for mission-critical systems and are encouraged
- password managers (keepassx or Password Safe) can make managing pass phrases more user-friendly

4.4.3 Documentation

Documentation is crucial! Not everyone can afford to spend hours every day cultivating digital literacy. Documentation helps bridge the gap. Commit a regular portion of your work time to completing documentation.

This documentation was created using the Sphinx tool to provide structure. The code is hosted on Github and you are reading the output on https://readthedocs.org

See Write the Docs for help getting started with documentation.

If you are collaborating with non-technical people on documentation, use a version-controlled system like Draftin.com or Google Documents to collaborate.

Documentation culture is an uphill battle at most organizations. Amnesty International is in the process of a cultural change towards understanding and appreciating the need for documentation.

Digital Communications Systems

5.1 The Catalogue

A catalogue is an essential part of organizing digital assets. A catalogue helps us put each piece of published material in its proper context as it relates to both our goals and all other published material. A catalogue is composed of metadata (such as an information architecture or controlled vocabulary), which describes the material, and the material itself.

5.1.1 Metadata

We use metadata to classify documents. Metadata is used to identify and group content into meaningful collections. These collections can be non-exclusive, meaning a document can exist in more than one collection at a time.

The systems we use to classify and collect documents are outlined here.

5.1.2 Controlled Vocabulary

A controlled vocabulary is:

- · A way to describe a set of ideas in a predictable way
- A specific collection of words and relationships between words
- A way to understand the contents of documents systematically

A controlled vocabulary do provides a list of words to use to describe a document: ie, a predictable source of metadata.

Over time, and in conjunction with other tools for digital asset management, controlled vocabulary keeps a library of content searchable and useful even as it grows to be very large and complicated.

The process:

- 1. First, choose a list of words that is specific enough to the describe content in useful detail and broad-enough to describe all the content we want to include in our catalogue;
- 2. Then, content creators and editors choose words from the list to describe the documents they produce;
- 3. These words are attached to the document the process can be manual or computer assisted, but a human who understand the content has the important role of identifying its semantic meaning;

4. The documents are published and held in our catalogue, which is able to search and group items by the information in the metadata.

A controlled vocabulary isn't the only kind of metadata that is important - there is also information about the kinds of documents we produce (their length, for example), or the programs that spur their creation, or the community the document is meant to serve. But semantic metadata applied through a controlled vocabulary is the most important kind of metadata for understanding the meaning of a document.

5.1.3 Information Architecture

The following llist outlines all of the areas of publication activity. Some areas are public-facing and some are internalonly communications. Nonetheless, DigitalComs is active in some way in most of these areas and all most all of them have at least on page (or a page is needed) on the corporate website.

- Governance
 - annual general meeting
 - executive committee (board)
 - special projects and committees
 - international meetings
 - evaluation and strategic initiative
 - conflict resolution
 - directors
- Communications and Marketting
 - information services resource centre
 - digital/online communications
 - public awareness projects
 - market research
 - national media liason
 - * Ottawa
 - * Toronto
 - communications strategy
 - materials distrobution (online store)
 - social media outreach assistance
 - digital media capactiy development
- Information Technology
 - network support
 - iMIS coordination
 - iMIS integration
 - IT review
- · Member Services
 - point of contact

- * phone
- * members@amnesty.ca
- * message box on amnesty.ca
- * call centre
- member-activism liason
- Resource Development (Donations)
 - monthly giving
 - direct mail
 - honoring gifts
 - 3rd party special events
 - planned giving
 - major donor giving
 - 1800
 - workplace giving
 - online giving
 - special events
- Human Resources
 - job listings
 - training programs
 - volunteering
 - internships
 - cultural diversifications
 - gender mainstreaming
- Publications
 - reports
 - * External (from IS)
 - * Internal (mission reports)
 - newsletters
 - * Wire
 - * Candle
 - * Rights Now!
 - * Speak Out
 - audio/visual
- · Action Strategies
 - major campaigns
 - * corporate accountability

5.1. The Catalogue

- * MENA
- * arms control
- * Indigenous people of Colombia
- * Sexual and Reproductive Rights
- * "countering terror with justice" (sic)
- * crisis response
- * missions
- Human Rights Agenda
 - * urgent action
 - * Americas program
 - * representation
 - * indigenous rights
 - * refuguees and migrants
 - * women's rights
 - * security and human rights
- Grassroots Activism
- initiatives (GO team)
- groups
 - * youth groups
 - * community groups
 - * action cirles
- networks
 - * urgent action
 - * medical
 - * youth
 - * online
 - · Twitter feeds
 - · Facebook groups
 - · Flickr
 - · Pinterest
 - · Tumblr
 - · Youtube
 - · discussion forums
 - · mailing lists
- member activism
 - * initiatives

- * events
- * groups
- events
 - * human rights college
 - * lectures, presentations, discussions
 - * film fests
 - * concerts
 - * writeathon
- Regional Support
 - * hubs
 - * regional meetings
 - * offices
 - · Vancouver
 - · Toronto
 - · Halifax
- Intermediate Structures (Outreach)
 - fieldworkers
 - partner networks
 - coalitions
 - outreach initiatives
 - theme/issue coordinators
 - country coordinators
 - coordinator training and projects
 - coordination council meetings

5.2 Content

There are actually only a few content types we use:

- Post: a story, including: News, Reference, Project, Blog, and Media;
- **Bio**: the story of a person, or group of people; be they an author, volunteer, board member, individual, or collective:
- Event: a story about a thing that will happen, or has happened, in which people can participate;
- Job: an opportunity to participate in Amnesty International's work and the movement, paid or volunteer
- Message: a story sent to a specific person of group of persons, includes e-mails (often collected in digests or archives), discussions, announcements.

Whether a peice of material is erial or single, part of a collection or stand-alone is also a factor.

5.2. Content 17

5.3 Style guide

The International Secretariat of Amnesty International has developed a Global Identity kit, including a style guide, templates, and guidelines for writers. Each branch should produce its own "house style" to cover local issues, concerns, and formatting requirements (such as how to write addresses). Please consult these documents.

5.3.1 Colours

Nonetheless, for quick reference, here are our colours:

• Yellow: 255 / #FFFF00

• Black: 0 / #000000

• Lt. Warm Grey: R199 G194 B186 / #c7c2ba

• Mid Warm Grey: R148 G147 B127 / #94937f

• Dk. Warm Grey: R118 G106 B98 / #766a62

• Lt. Cool Grey: R204 G204 B204 / #CCC

• Mid Cool Grey: 153 / #999

• Dk. Cool Grey: 102 / #666

Dark Blue: C100 M75 Y20 K10 / #004c84

• Dark Blue 50%: 50 37 10 5 / #808eb2

• Dark Blue 20%: 20 15 5 3 / #c2c6d6

• Bright Blue: C100 0 0 0 / #00aeef

• Bright Blue 50%: 50 0 0 12 / #63badd

• Bright Blue 20%: 20 0 0 6 / #bbdced

• Dark Red: 0 100 85 30 / #b10e23 - Don't tint red, it doesn't mix well with our colours.

5.3.2 Typeface

Amnesty Trade Gothic

- Main headings should be in the bold weight of Trade Gothic Condensed
- Regular weight should be used for sub-headings and body text
- When Trade Gothic is not available, use Arial regular and bold

Introduction

"It's about people."

Will Byrant said that to me on my first day on the job at Amnesty International Canada. He should know, he's been here working longer than anyone (and has done almost every job there is to do). I hope Will works here forever. He embodies trust, honesty, good-will (no pun intended) and commitment. This is what we believe in. As long as Will has faith in humanity, so do I. So should you. Upholding the right to be a human is based on the assumption and belief that in just societies people are, and want to be, good to one another. Upholding the social contract starts with you.

We work in a difficult time. The world is changing rapidly. Despots and villains persist, and they are aided by a socio-political communications landscape that is more and more mediated: every day new centralizations of network power seek to capture and dehumanize us - turn our activities, identities, and connections into atomized "data" on Siren Servers in the cloud - to sell opportunities to influence us, to silence and subsume our desires to theirs. It will get worse before it gets better. It will get harder to remain connected to reality.

It's all about people. Keep this at the core of everything you do. Amnesty International remains a force for dignity and humanity. For reality. We reject oppression, including soft blackmail and manipulation. The data is us: we are people, we have voice. Our words will not be idle chatter in the digital fray. I have hope that we will find a way to get our call for human rights heard among the noise.

Al Canada Digital Communications Manual Documentation, Release 0							

Getting started

This repository documents the work, processes, and practices of the digital communications department of Amnesty International Canada (English Speaking). It is a resource for communications workers both inside and outside the digitalcoms team.

Indeed, we hope this manual is useful to people outside Amnesty International Canada as an example of how a small team manages a publishing workflow for digital activism. This is how we work. We hope you can find a good way to work, too. If you use our guide, please let us know! We'd love to talk to you.

Included here are summaries of the core work of digitalcoms: **strategy**, **coordination**, and **implementation** (how to get stuff done). An outline of systems is also provided, but this remains an area of fluctuation and should be considered provisional. Also included is supplemental information related to keeping publication running smoothly.

Humans

I wrote this manual with a lot of help from Greg Clarke. Team members George Irish, Andrew Bales, Alexandra Lopoukhine, and others provided background material and support.

Neither Greg nor I work at Amnesty International anymore, but we remain active contributors to the movement. Find us at Github on the AmnestyInternational repos. We have some other inter sting projects you might also enjoy.

We welcome contributions from anyone. Please contact us.

Sincerely,

Jackson Couse

ex-Digital Production Specialist, Amnesty International Canada

November 15th, 2013