Ministry of Health
and Family Welfare
Government of India

सत्यमेव जयते

NATIONAL RURAL HEALTH MISSION
राष्ट्रीय ग्रामीण स्वास्थ्य मिशन

FACILITATOR'S GUIDE

Social and Behavior Change Communication (SBCC)

Training for Information, Education, and Communication (IEC) Officers

September 2013

USAID | INDIA
FROM THE AMERICAN PEOPLE

आरोग्यं सुखसम्पदा

ihbp IMPROVING HEALTHY BEHAVIORS PROGRAM

References

Content for this training was adapted primarily from C-Modules: A Learning Package for Social and Behavior Change Communication.

C-Change (Communication for Change). 2012. C-Bulletins: Developing and Adapting Materials for Audiences with Lower Literacy Skills. Washington, DC: FHI 360/C-Change.

C-Change (Communication for Change). 2012. C-Modules: A Learning Package for Social and Behavior Change Communication. Washington, DC: FHI 360/C-Change.

National Cancer Institute. 1989. Making health communications work: A planner's guide. Rockville, MD.: U.S. Department of Health and Human Services.

O'Sullivan, Gael, Joan Yonkler, Win Morgan, and Alice Payne Merritt. 2003. A field guide to designing a health communication strategy. Baltimore: Johns Hopkins Bloomberg School of Public Health/Center for Communications Programs.

Smith, Bill and John Strand. 2008. Social Marketing Behavior: A Practical Resource for Social Change Professionals. Washington, DC: AED.

For further information, please contact:

IHBP
4th Floor
14-15 Farm Bhawan
Nehru Place
New Delhi-110 017
+91-11-49924900
www.IHBP.org

FHI 360
1825 Connecticut Avenue, NW
Washington, DC 20009
202-884-8000
www.FHI360.org

This publication is made possible by the generous support of the American people through the U.S. Agency for International Development (USAID) under the terms of Contract No. AID-386-TO-11-00001. The content is the sole responsibility of IHBP, managed by FHI 360 a North Carolina, U.S.-based global nonprofit organization, and does not necessarily reflect the views of USAID or the United States Government.

Ministry of Health
and Family Welfare
Government of India

सत्यमेव जयते

NATIONAL RURAL HEALTH MISSION
राष्ट्रीय ग्रामीण स्वास्थ्य मिशन

FACILITATOR'S GUIDE

Social and Behavior
Change Communication (SBCC)

Training for Information, Education, and Communication (IEC) Officers

SEPTEMBER 2013

USAID | INDIA
FROM THE AMERICAN PEOPLE

आरोग्यं सुखसम्पदा

ihbp IMPROVING HEALTHY BEHAVIORS PROGRAM

Preface

Communication plays a powerful role in addressing barriers and shaping demand for and adoption of preventive and promotive practices related to health. Globally, there has been a paradigm shift in recent years from sporadic awareness-raising information, education, and communication (IEC) activities to strategic, evidence-based behavior change communication (BCC) strategies. The change has come about with the realization that as individual behavior is influenced by socio-cultural and gender norms, the need to mobilize communities in support of recommended behaviors is imperative along with integrating advocacy to influence policy and structural issues, leading to increasingly holistic approaches to health communication.

In India, communication has played a critical role in advancing health and development goals. Increased immunization rates, contraception prevalence, and HIV-preventive behaviors are strong testimony to the power of communication. The need and intent to evolve from IEC to BCC is well reflected in landmark frameworks for the country's Reproductive and Child Health Program - Phase II (RCH II) and the National Rural Health Mission (NRHM). The BCC strategy for RCH II is evidence-based, client-centered, professionally developed, multi-channel, service-linked, and efficiently monitored. The NRHM Framework for Implementation (2005–2012) envisages a "common approach to IEC for health", compared to "compartmentalized IEC of every scheme", to further the goal of preventive and promotive health practices.

In this context, it is important that communications professionals are able to design programs based on evidence and analysis; develop interventions and materials systematically and creatively; effectively manage implementation and program monitoring; and use research consistently to monitor, and measure outcomes.

The National Rural Health Mission (NRHM) seeks to provide effective health care to the rural population, especially disadvantaged groups; including women and children from vulnerable communities, by improving access, enabling community ownership and demand for services, strengthening public health systems for efficient service delivery, enhancing equity and accountability and promoting decentralization. The role of IEC Officers is crucial and in recognition of this fact, a five-day master training on "capacity building of IEC officers in Social and Behavior Change Communication" (SBCC) has been developed by the National Institute of Health and Family Welfare (NIHFW) in collaboration with USAID-funded, FHI 360-led **Improving Healthy Behaviors Program (IHBP)**.

Research on best practices in health communication has shown that communication is most effective when:

- It is research-driven and guided by social and behavioral theory
- Focuses on multiple levels of change: individual, family, community and social — in an enabling environment
- Is combined with improvements in health service delivery
- Creates community engagement through participatory approaches
- Uses a mix of media and a combination of communication approaches, including new media technologies

Social and Behavior Change Communication (SBCC) is a framework that uses the strategies of advocacy, behaviour change communication (BCC) and community mobilization to influence both individual and societal change. It uses a 360 degree approach that is focused not just on mass media but integrates mid-media and interpersonal communication. It systematically addresses the complex processes integral to planning, designing, implementing, monitoring and evaluating health communication.

The Ministry of Health and Family Welfare is committed to capacity strengthening of government staff to improve consistent use of SBCC strategies at the national to the state, district and sub-district levels. The five-day Social and Behavior Change Communication course developed by IHBP is a comprehensive training program intended to strengthen capacity to address the complex factors involved in influencing individual and social behaviors.

Mr. S.K. Rao
Joint Secretary (IEC)
Ministry of Health and Family Welfare
Government of India

New Delhi
November 2013

TABLE OF CONTENTS

ACRONYMS

ANC	Antenatal Care
ANM	Auxiliary Nurse Midwife
ASHA	Accredited Social Health Activist
BCC	Behavior Change Communication
BEES	Block Extension Educators
DDK	Disposable Delivery Kit
FP	Family Planning
HIV	Human Immunodeficiency Virus
IEC	Information, Education, and Communication
IFA	Iron-Folic Acid
IHBP	Improving Healthy Behaviors Program
IPC	Interpersonal Communication
IUGR	Intrauterine Growth Retardation
JSSK	Janani-Shishu Suraksha Karyakram
M&E	Monitoring and Evaluation
MCM	Modern Contraceptive Methods
MOHFW	Ministry of Health and Family Welfare
NFHS	National Family Health Survey
NIHFW	National Institutes of Health and Family Welfare
PLHIV	People Living with HIV and AIDS
SBA	Skilled Birth Attendant
SBCC	Social and Behavior Change Communication
TB	Tuberculosis
TFR	Total Fertility Rate
TV	Television
USAID	United States Agency for International Development
WRA	Women of Reproductive Age

Background

The FHI 360-managed Behavior Change Communication – Improving Healthy Behaviors Program (IHBP) in India project is a United States Agency for International Development (USAID)/India-funded program. IHBP aims to improve adoption of positive healthy behaviors through institutional and human resource capacity building of national and state institutions and through development of strong, evidence-based social and behavior change communication (SBCC) programs for government counterparts.

IHBP provides technical assistance to develop sustainable national- and state-level institutional capacity to design, deliver, and evaluate strategic evidenced-based BCC programs that will:

- Increase knowledge and attitudes of individuals, families, communities, and health providers about health
- Promote an environment where communities and key influencers support positive health behaviors
- Reduce barriers of vulnerable populations—e.g., women, people living with HIV (PLHIV), and tuberculosis (TB) patients—to demand and access health services

This SBCC training was designed for IEC officers working within the Ministry of Health and Family Welfare's (MOHFW) Information, Education, and Communication (IEC) divisions who oversee SBCC campaigns and programs. The goal of this training is to increase MOHFW IEC officers' understanding and application of SBCC processes and principles toward strengthening their ability to design, implement, manage, and evaluate SBCC programs.

How to use this training package

Training content and facilitator's instructions are included in this Facilitator's Guide as well as in an accompanying PowerPoint presentation that facilitators can choose to use or to guide development of pre-populated flip chart pages or overheads for projection. Complementary content and practical tools specific to creating materials are provided in the ***Creating SBCC Campaigns Toolkit***, which will be distributed to training participants and more widely. Participant handouts specific to this training are also included as part of this *Facilitator's Guide*.

Within this guide, there are **seven modules**:

- Introductory Module
- Module 1: Understanding the Situation
- Module 2: Focusing and Designing
- Module 3: Creating
- Module 4: Implementing and Monitoring
- Module 5: Evaluating and Replanning
- Training Close

Each module in this guide contains the following sections:

- Learning objectives
- Overview of sessions contained in the module
- Materials needed
- Advance preparation required
- Handouts

PROPOSED WORKSHOP SCHEDULE

This Facilitator's Guide is based on a five-day workshop schedule. Below is an overview of the suggested timing based on approximate timings provided for each module and session. Facilitators should feel free to tailor this schedule to suit their workshop objectives. However, they should be careful to ensure sufficient time is allotted for participants to apply and reflect on the concepts included.

	DAY ONE	DAY TWO	DAY THREE	DAY FOUR	DAY FIVE
Morning	Introductory Module	Module 1	Module 2	Module 3	Module 4
Afternoon	Introductory Module Module 1	Module 1 Module 2	Module 2	Module 3	Module 5 Training Close

ENERGIZERS AND CLOSERS: A FEW IDEAS

It is useful for facilitators to prepare in advance a few energizers and closers that can be used to re-energize participants during the training and to close each day in a way that integrates the day's learning and prepares participants for next steps. Below are a few energizer and closer suggestions. Participants may have their own energizers that they can also suggest and lead for the group.

Energizers

1. **BCC:** This energizer takes approximately 30 minutes. Ask participant to stand up in pairs and face each other. Once in pairs, instruct them to observe each other for 30 seconds without talking. After 30 seconds, ask participants to turn their backs to their partners and within 30 seconds, to change **five** things about their appearance (Note: the trainer may also wish to change their appearance to encourage them). They can modify, take off, or add anything to their appearance. After 30 seconds, ask participants to turn and face their partners and to identify the five changes their partner has made. Then, ask participants to turn their backs again and make five more changes. When they are ready, instruct participants to turnaround and identify the changes made.

Now, briefly discuss the exercise using the following suggested questions and guidelines:

- Ask participants to describe the experience.
- What did it feel like to observe each other for 30 seconds?
- Was it hard to change five things about their appearance?
- How did they feel doing it? How did they feel about doing it a second time? Was it easy, uncomfortable, fun? How many only removed items? We often think of change as taking something away but we can also add things.
- Toward the end of the discussion, ask

how many switched back to the way they were before the exercise? It is difficult to sustain changes, especially when society and culture do not support them.

- Ask the group what we can conclude about behavior change from this exercise.
- Conclude by pointing out that
  - it can be difficult to make changes that someone asks us to do
  - we need to observe people, talk with them, and think about changes they are willing and able to make
  - we need to think about what helps people sustain the changes they make
  - we cannot force anyone to change
  - behavior change is a process, which means that change may not happen all of the sudden

2. **Ha:** This energizer takes approximately 5–10 minutes. Write down the word "Ha" on a piece of paper. Ask participants to form a circle. When they are ready, explain the objective of this exercise is to pass the word Ha around the circle without laughing. Designate one person as the head of the circle. The participant should begin by saying Ha. The person to his or her right must repeat the Ha and then say another Ha. The third person must say Ha, Ha, and then another Ha, and so on. This continues around the circle until all the participants, trying not to laugh, have repeated the Ha's that preceded them and added their own Ha. (Source: www.trainerbubble.com)

3. **Empty Chair:** This energizer takes about 15 minutes and can be used to lighten the mood of the group or after a heated discussion. Instruct participants to sit on chairs in a large circle in the room. Within the circle, there should be one empty chair. The person who has this empty chair to their right says: "My right, right place is empty; I wish that Guarav was a monkey and was sitting here." Guarav must act like a monkey and then move to the empty chair. The activity then continues with the person who has the empty chair on his right who can choose whichever person he wants and whatever animal. Continue until you think the energizer has run its course. (Source: www.trainerbubble.com)

4. **Pop the Problem:** This energizer lasts about 10–20 minutes and is good to help address issues that arise in the training. The facilitator will need to provide balloons, markers, pens, and a pin. Participants are told to consider issues they have with a particular topic and formulate them into problems. These are then written onto blown up balloons. The group as a whole works on the various problems until there is a satisfactory solution. Once found, the person who wrote the problem uses a pin to burst the balloon. (Source: www.trainerbubble.com)

5. **My Right Foot:** This activity takes 5 minutes. Read the following and ask participants to follow your instructions. While sitting, lift your right foot off the floor and make clockwise circles. Now, while doing this, draw the number '6' in the air with your right hand. The participants' foot will change direction no matter how many times they will not be able to stop it. This energizer demonstrates that we are not always in as much control as we think. (Source: www.trainerbubble.com)

Closers

1. **Partner Quiz:** A good 30 minutes (or more) before the end of the day, pair participants with someone they have not worked with so far. With their learning materials in hand, the pairs take turns creating quiz questions for each other on the day's work. The "quizzer" affirms his/her partner's response and adds to it or clarifies something. Then, the other person creates and poses a question. After sufficient time, pull the group together and field one question from each pair that they would like to explore further. This is a great way for a facilitator to assess learning as it happens and to see where the participants want more explanation, guidance, or practice.

2. **Team Debate:** Divide the group into two equal-sized teams (mixing fields or locations of work as much as possible). Using a set of provocative statements related to the day's content, write the statement on a chart and pose it to one team. This team then has to decide what position to take on the statement and quickly come up with an argument to defend their position and present it to the other team. The team is awarded points on a scale of one to four, with four being an excellent defense of their position. Then it is the other team's turn with a new statement. The team with the most points in the end wins.

3. **Secret Question:** A workshop often shakes up old ways of thinking and doing things that leaves participants with more questions. In this exercise pass around a basket of index cards and ask pairs to take at least one—more if they like—and secretly write a question about anything they've thought of that relates to the workshop content. Participants should be as clear as possible in their question. Read each question aloud and offer responses or reactions, while inviting others in the room to add their own. This is a great way to track what is unclear and what ought to be addressed at some future stage.

4. **What I Got from Today:** Draw a large quadrant on a chart with the following four words: Know, Challenge, Change, and Feel. Each participant is asked to do the same on a regular-sized sheet and fill in the quadrants by responding to these four (or similar versions of these four) questions:

   - **Know:** What did you study today that confirmed something you already knew?
   - **Challenge:** What challenged you today?
   - **Change:** What is one way you plan to change your work, based on today's learning?
   - **Feel:** How do you feel about what you learned here?

   The participants discuss their answers in small groups while the facilitator wanders around to collect the sheets (which are anonymous) to review in the evening.

Additional Facilitation Tips

- Begin each day with a brief overview of what was covered the previous day. A "reporting team" can be assigned for each training day to provide this recap.
- Assign volunteer roles for each day as needed, including a time keeper, report team, and logistics support team.
- Display a question-and-answer/ comments box for participants to use anonymously and address any notes that are put into it at the beginning of each day.
- Hang a sign entitled 'Parking Lot' where participants can post unresolved questions or discussion topics to refer back to at the end of the day, workshop, or to save for further discussion during breaks or lunch.
- Review module objectives prior to beginning each new training component.
- Elicit participants to ask questions throughout the training sessions.
- For "listen for" and "post answers such as" sections in the facilitator's notes, use suggested responses as prompts to elicit these types of answers with participants or suggest them as possible additional responses.
- Recap key content takeaways after completing each training session (as provided at the end of each session in this Facilitator's Guide and in the PowerPoint presentation).
- If running over time, consider eliminating some components or small group work (or alternatively, integrating some of these exercises into plenary activities). Work with participants to determine which remaining training areas are of most interest to them and which are a lower priority when determining these cuts.

PRE AND POST-TEST ANSWER KEY

Q1	A
Q2	D
Q3	D
Q4	E
Q5	C
Q6	D
Q7	B
Q8	F
Q9	B

Q10	D
Q11	C
Q12a	A
Q12b	B
Q12c	C
Q13	E
Q14	E
Q15	A

SESSION LEGEND

Total time suggested for the session. This will vary depending on the size of the group, amount of time needed by the group to complete work, and other factors. The times listed in the *Facilitator's Guide* are only guidelines.

Indicates a **participant hand out** is needed for a particular activity.

FACILITATOR'S NOTE

Provides **additional content**, guidance on activities, suggested areas for adaptations, and other relevant material.

Content

Content that belongs on a **flip chart or PowerPoint slides** will be presented in boxes. Several flip charts will be used over several sessions, so these should be posted on the wall or somewhere accessible.

Writing activity instructions on flip charts is also suggested so that participants can remember the activity. This Facilitator's Guide only has the content portion of the material in flip chart boxes, and it is up to the facilitator to determine what additional instructions and materials to put onto a flip chart.

Indicates a **group discussion**.

Indicates a **group exercise**. For this training, there are two types of group exercises:

1) **Small project team exercises** with consistent groups that work together across multiple exercises; these groups are formed in Module 1.

2) **Mixed small group exercises** where participants are assigned to group randomly or by another means specified in the *Facilitator's Guide.*

References content that is detailed further in the ***Creating SBCC Campaigns Toolkit***, a complementary tool to this training.

INTRODUCTORY MODULE

Workshop Welcome and Introduction to Social and Behavior Change Communication (SBCC)

TOTAL TIME

3.75 hours
(not including breaks)

LEARNING OBJECTIVES

By the end of this session, participants will be able to (PowerPoint Slide #2):

- describe five key factors about human behavior
- describe why SBCC is important for our work
- list three characteristics of SBCC
- list five essential steps to communication planning
- describe the different levels of the socio-ecological model
- list the four cross-cutting factors of the socio-ecological model
- describe SBCC's three strategies
- name at least three of the 10 overarching principles of SBCC

OVERVIEW

Session	Title	Duration
1	Welcome	30 minutes
2	Pre-Test	15 minutes
3	Participant Introductions	15 minutes
4	SBCC Defined	45 minutes
5	Three Characteristics of SBCC	90 minutes
6	Ten Overarching Principles of SBCC	30 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation and pretests
- LCD projector (if available)
- name tags
- participant registration forms
- cards

Advance Preparation

- Identify and invite someone to open the workshop, if applicable.
- Ensure all training logistics are arranged prior to conducting the workshop.
- Create a question-and-comment box for participants to use.
- Develop the workshop schedule for participants. Be sure to insert dates, start and end times, breaks, lunch, and energizers.
- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts, pretests, and PowerPoint slides.
- Have relevant cards to be used in sessions ready for posting (e.g., C-Planning steps).

Handouts

- Workshop Agenda (facilitator to adapt/develop)
- Pretest: Annex A
- Participant Handout #1: C-Planning
- Participant Handout #2: Socio-Ecological Model
- Participant Handout #3: Three Key Strategies of SBCC
- Participant Handout #4: How SBCC's Key Strategies Contribute to Programs
- Participant Handout #5: Ten SBCC Principles
- Participant Handout #6: Prachar Case Study
- Slides #1–#28

SESSION 1

Welcome

TOTAL TIME

30 minutes

INSTRUCTIONS

1. Welcome participants to the workshop.

- Explain that the National Rural Health Mission (NRHM) has significant goals and social and behavior change communication (SBCC) can help achieve these goals.
- SBCC is a framework that is based on global best practices in health communication that have proven successful.
- SBCC has been adapted for use in public health settings based on cutting-edge principles of marketing and advertising.
- This workshop will challenge participants to make a radical shift in the way they design communication material and activities.
- At the same time, this workshop represents an important professional opportunity for participants to understand and learn how evidence-based campaigns are planned, developed, implemented, and evaluated.
- It is important for all of us as health professionals to be up to date in our knowledge and skills and adopt evidence-based best practices within our work.

2. Introduce opening speaker, if applicable.

FACILITATOR'S NOTE

The opening speaker may be provided by the hosting agency. Their role is to illustrate the importance of the workshop and the commitment to provide Ministry of Health and Family Welfare (MOHFW) staff with further training to develop professional skills in designing, implementing, and managing SBCC activities.

3. Facilitators should introduce themselves to the participants.

4. Review workshop logistics (e.g., workshop space, restrooms, meals, transport considerations).

5. Distribute the workshop agenda, review, and answer any questions.

6. Explain that this training was also designed to complement a Toolkit for participants to use when they are developing materials. The Toolkit is entitled, ***Creating SBCC Campaigns***. Hand out the Toolkit if it has not already been distributed. Explain that we will be referring to the Toolkit in subsequent sessions.

7. Explain the question/comment box. If participants have questions or comments they would like to make anonymously, they may write them down and drop them in the box. Each morning, the session will begin by addressing any questions or comments in the box.

> **FACILITATOR'S NOTE**
> At the beginning of each day, review any comments put in the question/comment box.

8. **(10 minutes)** Ask participants to share their expectations for the workshop. Write them on the flip chart. After they are listed, respond to the list and indicate which are likely to be met during the week and which may be outside of the scope the workshop. Add to the list as needed in accordance with the workshop objectives.

Record on the Flip Chart

Participant expectations of this workshop:

> **FACILITATOR'S NOTE**
> Throughout the workshop, several flip charts will be re-used in subsequent sessions. Find a place on the wall that is easily accessible to post important notes from discussions with participants.

SESSION 2

Pre-test

TOTAL TIME
15 minutes

HANDOUTS

› Pre-test (Annex A)

INSTRUCTIONS

1. Explain that participants will complete a pre-test that will help the facilitators to ensure that each session's learning objectives are adequately met. Hand out the pre-test to each participant and ask them to complete it individually. After 10 minutes or when all participants have completed the pre-test, collect the forms.

2. Hand out the pretest to each participant and ask them to complete it individually. After 10 minutes or when all participants have completed the pretest, collect the forms.

FACILITATOR'S NOTE

At the beginning of each session, required handouts will be noted. It is up to the facilitator to determine when to distribute the handouts (either before or during the session).

TOTAL TIME

15 minutes

SESSION 3

Participant Introduction

INSTRUCTIONS

1.  Ask participants to form a pair with someone they have not previously met.

2. **(5 minutes)** Explain that each pair will have five minutes to get to know each other and then they will introduce their partner. Ask participants to be prepared to tell the group:
   - their partner's name
   - where they are from
   - how many years they have been involved in health communication
   - what health problems they have been most involved in with their work (e.g., low uptake of family planning methods, poor maternal health outcomes)

3.  Reconvene and ask participants to introduce their partner to the larger group. Write down the different health problems (e.g., reproductive health, maternal health, child health) on a flip chart and the number of years of experience. These may be used later in for a small group exercise.

   Record on the Flip Chart

Number of Years Working in Health Communication:
Areas of Work by Health Problem:

4. After everyone has shared their information, add up the total years of experience in the room and acknowledge the vast experience of participants.

SESSION 4

SBCC Defined

TOTAL TIME

45 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- describe five key factors about human behavior
- describe why SBCC is important for our work

INSTRUCTIONS

1. Explain that we will now review the definition of SBCC and describe the approach's evolution from information, education, and communication (IEC).

2. Refer to a pre-populated flip chart page or **PowerPoint slide #7** and provide the definition of SBCC.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #7

What is SBCC?

SBCC is the systematic application of interactive, theory-based and research-driven communication processes and strategies to address change at:

- individual
- community, and
- societal levels

3. Explain that when we talk about SBCC we are referring to a framework that addresses both *social change* and *behavior change*. Use a pre-populated flip chart page or **PowerPoint slide #8** to present these definitions.

Turn to Pre-Populated Flip Chart Page with the Content Below or PowerPoint Slide #8

Social Change includes changes in:	**Behavior Change** includes changes in:
› social order and institutions › social behaviors › norms	› human behavior

4. **(5 minutes)** Ask the group to think about:

› *"Why do social change **and** behavior change matter to what we do as public health and communication professionals?"*

Record on the Flip Chart

Why social change **AND** behavior change matter:

FACILITATOR'S NOTE

Post responses on the flip chart. Listen for and post responses such as:

› Both are necessary for programs to improve health outcomes.

› Social change and behavior change are complementary

› Using both strategies ensure that change is sustainable.

5. Explain that both social change and behavior change need to be addressed for our work as public health communication professionals to be successful, because

› human behavior is at the root of most health and development programming

› but, addressing individual behavior alone is often not enough to achieve sustainable health outcome change

6. Refer to a pre-populated flip chart page or **PowerPoint slide #9** and explain that today we are going to discuss how to address both social and behavior change through an SBCC approach. In doing so, we are first going to describe the approach's evolution from IEC to behavior change communication (BCC) to SBCC.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #9

IEC to BCC to SBCC: An Evolution

- SBCC has evolved from IEC and health education
- Earlier models used a linear "expert–learner" or "sender–receiver" paradigm to transfer information
- The focus then shifted to BCC, which emphasizes analysis of behaviors and determinants to affect changes in
  - knowledge
  - attitudes
  - practices
- Now, our focus is SBCC, which employs a more comprehensive approach.

FACILITATOR'S NOTE

To introduce greater audience participation, ask participants to present the content on the slides where appropriate.

7. Explain that as SBCC practitioners, we now have a central understanding of five key facts about human behavior, which have shaped this evolution from IEC to SBCC. Use a pre-populated flip chart page or **PowerPoint slides #10–#14** to present these facts.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #10-14

5 Key Facts about Human Behavior

1. **People give meaning to information based on the context in which they live.**
   For example: A married woman with three children may be more receptive to family planning information than a newly married woman who does not yet have children.

2. **Culture and networks influence people's behavior.**
   For example: Contraceptive use in India varies greatly by religion and caste, though knowledge of contraception is nearly universal.

3. **People cannot always control the issues that determine behavior.**
   For example: A woman may not be able to plan and space her pregnancies if her husband does not support her use of contraception.

4. **People's decisions about health and well-being compete with other priorities.**
   For example: Men who smoke and drink excessively may know that these practices are harmful for their health. But, they may continue to do so because it is perceived as macho behavior. The pressure to be seen as a 'real man' may override health considerations.

5. **People often make decisions based on emotional factors, not logic.**
   For example: Woman with repeated, closely spaced pregnancies may know that they are risking their lives. But, if their desire is a male child, they may keep trying until they achieve their goal.

8. 

Ask participants

- **(5 minutes)** Are there other examples of these key facts that you can share from your work experience?

9. Explain that now that we have discussed some components of SBCC, we will go more in-depth into its definition and components.

10. Ask participants if they have any questions.

KEY SUMMARY POINTS FOR INTRODUCTORY MODULE, SESSION 4 (POWERPOINT SLIDE #15)

- SBCC is the systematic application of interactive, theory and research-driven communication processes and strategies that address change at individual, community, and societal levels.
- SBCC refers to both social change and behavior change.
- SBCC has evolved from IEC and BCC and employs a more comprehensive approach.
- IEC officers should know that there are five key facts about human behavior and reflect on these when designing programs.

TOTAL TIME

90 minutes

SESSION 5

Three Characteristics of SBCC

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- list three characteristics of SBCC
- list five essential steps to communication planning
- describe the different levels of the socio-ecological model
- list the four cross-cutting factors of the socio-ecological model
- describe SBCC's three strategies

HANDOUTS

- Participant Handout #1: C-Planning
- Participant Handout #2: Socio-Ecological Model
- Participant Handout #3: Three Key Strategies of SBCC
- Participant Handout #4: How SBCC's Key Strategies Contribute to Programs

INSTRUCTIONS

1. Revisit the definition of SBCC with participants and also explain to participants that SBCC has three distinct characteristics that we will cover in this introductory module. Turn to a pre-populated flip chart page or **PowerPoint side 17**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #17

What is SBCC?

- SBCC is the systematic application of interactive, theory-based and research-driven communication processes and strategies to address change at *individual, community*, and *societal levels*.
- SBCC is a framework that has 3 distinct characteristics.
  - SBCC is a **process**.
  - SBCC uses a **socio-ecological model**.
  - SBCC operates through three **key strategies**.

2. Explain to participants that the first characteristic of SBCC is that it is a *planned* process.

3. Explain that this process has five distinct steps. Share that for this training, we are calling this C-Planning for Communication Planning but that there are other similar processes with different names that may also be used, such as the P-Process, since the components are similar.

4. Post around the room in no particular order the cards that list the five C-Planning steps.

FACILITATOR'S NOTE

Pre-populate cards ahead of the training. The five cards should say

- Understanding the situation;
- Focusing and Designing;
- Creating;
- Implementing and Monitoring; and
- Evaluating and Re-planning

5. **(5 minutes)** Ask the group to discuss and put the steps in the correct order. Call time in five minutes. If participants arrived at the correct order, congratulate them. If not, put the cards in the correct order and explain why you are moving the steps around.

6. Hand out **Participant Handout #1**, which is a picture of the C-Planning graphic (also displayed on **PowerPoint slide #18**).

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #18

C-Planning

7. Explain that as we go through the SBCC training, we will use these five steps to guide the order of the content that we are covering and that each step of C-Planning draws upon the previous step.

8. Ask participants if they have any questions related to C-Planning.

9. Revisit with participants that the second characteristic of SBCC is that it is uses a socio-ecological model.

10. Hand out **Participant Handout #2**, which presents a socio-ecological model for change.

11. Explain that:

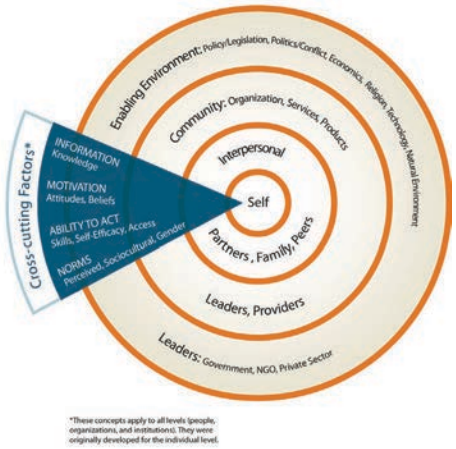
- A socio-ecological model examines layers of influence to provide insight on the causes of problems (e.g., tobacco use among youth) in order to find possibilities for change.
- The model helps us to look at ways in which personal and environmental factors are inter-related and how they influence each other.

12. Turn to a pre-populated flip chart page showing the socio-ecological model or **PowerPoint slide #19**. Explain that the socio-ecological model has two parts:

- **Levels of Analysis**: which are represented on the model as rings
- **Cross-Cutting Factors**: which are represented on the model in the triangle

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #18

Socio-Ecological Model for Change



SOURCE: Adapted from McKee, Manoncourt, Chin and Carnegie (2000)

13. Ask for participant volunteers to read each level and give an example of who might be included in each level.

FACILITATOR'S NOTE

Reinforce correct answers and respectfully clarify or lead the group to clarify incorrect examples. Examples of correct responses include:

- **the individual**, who is the person, or the self in relation to the program
- **interpersonal**, which includes partners, family, or peers
- **community,** which includes leaders and health providers

14. Thank the volunteers and explain that the socio-ecological model is based on a variety of theories, which are represented by the **cross-cutting factors** found in the triangle on the left of the model.

15. **(5 minutes)** Ask participants:

- Which theories of human behavior or models are they familiar with?
- Explain that we do not have time to go into depth into these but the socio-ecological model was developed based on a variety of individual-level theories (e.g., Health Belief Model, Stages of Change), interpersonal-level theories (e.g., Theory of Social Learning), and community/social-level theories (e.g., Diffusion of Innovations).
- Explain that when we use a socio-ecological model as a guide for developing communication programs and campaigns, we ensure that our approach is consistent with the tenets of well-established theories of human and social behavior.

16. Turn to a pre-populated flip chart page related to the cross-cutting factors or **PowerPoint slide #20**. Ask a participant to present the content.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #20

Cross-Cutting Factors of the Socio-Ecological Model

1. **Information:** information that is timely, accessible, and relevant
2. **Motivation:** determined by attitudes and beliefs about the issues we are trying to change
3. **Ability to Act:** e.g., skills and self-efficacy
4. **Norms:** values of a group that specify actions expected by society, including perceived norms, socio-cultural norms, and gender norms

17. Explain that each of these audience factors is a relevant consideration toward informing communication campaigns. Turn to a pre-populated flip chart page with cross-cutting factor examples or **PowerPoint slide #21**. Ask a participant to present examples of these factors as they relate to the problem of stigma and discrimination toward people living with HIV in India.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #21

Cross-Cutting Factors Example

Problem: stigma and discrimination against people living with HIV in India among the general public

1. **Information:** lack of knowledge about HIV transmission
2. **Motivation:** fear of acquiring HIV
3. **Ability to Act:** lack of confidence in one's ability to stand up to others who may be stigmatizing or discriminating against someone suspected to be HIV+
4. **Norms:** socio-cultural and religious norms, gender norms, pervasive culture of stigma and discrimination toward these individuals

18. Ask participants if they have any questions related to the socio-ecological model.

19. Revisit with participants that the third characteristic of SBCC is that it is uses three key strategies.

20. Hand out **Participant Handout #3** and turn to a pre-populated flip chart page that shows SBCC's strategies or **PowerPoint slide #22**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #22

Key Strategies of SBCC

SOURCE: Adapted from McKee, N. Social Mobilization and Social Marketing in Developing Communities (1992)

21. Explain that the three key strategies of SBCC are

- **advocacy** to raise resources as well as political and social leadership commitment to development actions and goals
- **social mobilization** for wider participation, coalition building, and ownership, including community mobilization
- **behavior change communication (BCC)** using mass and social media, community-level activities, and interpersonal communication for changes in knowledge, attitudes, and practices among specific audiences

22. Share with participants that the three strategies are on a planning continuum so that programmers can begin with any one of them or can link to other partners programs to complement the key strategy (e.g., BCC) that they are working on.

23. Note that the strategies we select for our programs depend first on a situation analysis, which we will delve into further in the next module.

24. Hand out **Participant Handout #4**, a worksheet that looks further at the key strategies of SBCC and how they apply to programs.

25. **(15 minutes)** Break participants up into pairs who work together, are from a similar geographic area, or who work on the same issue (e.g., maternal and child health, family planning). Assign each pair one of the three strategies to work on (advocacy, social mobilization, behavior change communication). Instruct participants to complete the worksheet. Give groups 15 minutes to complete the exercise.

26. **(5 minutes)** Bring the group back together and ask for volunteers to share examples of how advocacy, social mobilization, and BCC have been used within MOHFW projects or in support of other communication initiatives they have worked on previously or know of.

27. Ask participants if they have any questions related to the three strategies.

KEY SUMMARY POINTS FOR INTRODUCTORY MODULE, SESSION 5 (POWERPOINT SLIDES #23–#24)

- SBCC has three characteristics: 1) it is a process, 2) it uses a socio-ecological model, and 3) it operates through three key strategies.
- SBCC operates through five distinct planning steps:
  - Understanding the situation
  - Focusing and designing
  - Creating
  - Implementing and monitoring
  - Evaluating and replanning
- A socio-ecological model examines several layers of influence to provide greater insight into the causes of problems.
- The socio-ecological model is based on the theories and tenets of human behavior.
- Cross-cutting factors we look at when using a socio-ecological model include information, motivation, ability to act, and norms.
- The three key strategies through which SBCC operates are: advocacy, social mobilization, and BCC.
- SBCC has evolved from IEC and BCC and employs a more comprehensive approach.
- IEC officers should know that there are five key facts about human behavior and reflect on these when designing programs.

SESSION 6

Ten Overarching Principles of SBCC

TOTAL TIME

30 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- name at least three of the 10 overarching principles of SBCC

HANDOUTS

- Participant Handout #5: Ten SBCC Principles
- Participant Handout #6: Prachar Case Study

INSTRUCTIONS

1. Explain that now that we have an understanding of what SBCC is, we will discuss in brief 10 overarching principles that practitioners should follow when developing SBCC programs and campaigns.

2. Hand out **Participant Handout #5**, Ten SBCC Principles, and turn to a pre-populated flip chart page that shows the 10 principles or **PowerPoint slides #26–#27**. Ask for a volunteer to read through the principles and explain that we will explore this guidance further throughout the subsequent training modules.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #26–#27

Ten Principles of SBCC

Principle 1: Follow a systematic approach (e.g., C-Planning).

Principle 2: Use research, not assumptions to drive your program.

Principle 3: Consider the social context.

Principle 4: Keep the focus on your audience(s).

Principle 5: Use theories and models to guide decisions (e.g., the socio-ecological model).

Principle 6: Involve partners and communities throughout.

Principle 7: Set realistic objectives and consider cost-effectiveness.

Principle 8: Use mutually reinforcing materials and activities at many levels.

Principle 9: Choose strategies that are motivational and action-oriented.

Principle 10: Ensure quality at every step.

3. **(5 minutes)** Hand out **Participant Handout #6**, Prachar Case Study. Ask participants to read through the case study silently on their own or ask for a volunteer to read it aloud to the group.

4. **(10 minutes)** Ask participants to reflect on the case study they have just read and as a group, discuss how the Prachar project exemplified some of the 10 SBCC principles we just reviewed.

FACILITATOR'S NOTE

There are no right or wrong answers for this group discussion and there may not be an answer for every principle. Some examples of responses may include:

- **Principle 1:** The Prachar project used a phased approach.
- **Principle 2:** The Prachar project conducted a situation analysis.
- **Principle 3:** Activities included an array of partners and environments.
- **Principle 4:** The audience was addressed by life stage/sub-population.
- **Principle 5:** The Prachar project used several strategies that were consistent with an SBCC approach (e.g., advocacy, IPC).
- **Principle 6:** The project worked with a range of partners and stakeholders.
- **Principle 8:** The project used both advocacy and IPC approaches, which are mutually reinforcing.

5. Thank the group for their participation. Explain that we have now finished the Introduction Module.

6. **(10 minutes)** Before moving onto Module 1, ask participants to briefly discuss what they think SBCC can and cannot do for a program?

FACILITATOR'S NOTE

Listen for answers such as:

SBCC Can

- increase knowledge and awareness
- counter myths and misconceptions
- influence perceptions, beliefs, attitudes
- prompt action
- trigger an individual to adopt and maintain a healthy behavior
- demonstrate and allow new skills to be practiced
- reinforce self and collective efficacy
- address barriers
- support or initiate norm change

SBCC Cannot

- compensate for inadequate infrastructure or logistics of services (though it can mobilize or advocate for improvement in these areas)
- produce sustainable change without support from other program components or programs providing services, technology, and enforcing regulations and policies (though it can link with these programs)

KEY SUMMARY POINTS FOR INTRODUCTORY MODULE, SESSION 6 (POWERPOINT SLIDE #28)

- There are 10 key principles of SBCC that IEC officers should keep in mind when designing and implementing SBCC campaigns and programs to ensure they are effective, of high-quality, and evidence based.

MODULE 1

Understanding the situation

TOTAL TIME

5.25 hours
(not including breaks)

LEARNING OBJECTIVES

By the end of this session, participants will be able to (PowerPoint Slide #29):

- describe reasons for conducting situation analyses
- use a problem tree tool to better understand a problem
- identify a person most affected by a problem, those directly impacting them, and those indirectly impacting them
- conduct a context analysis
- identify formative research needs
- write a problem statement and identify changes the statement calls for

OVERVIEW

Session	Title	Duration
1	What is Meant by Understanding the Situation	15 minutes
2	Layers of Causes and Effects	90 minutes
3	People Analysis	30 minutes
4	Context Analysis	90 minutes
5	Research Gaps and How to Fill Them	45 minutes
6	Summary of Analysis	45 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation
- LCD projector (if available)
- sticky notes (or paper and tape)

Advance Preparation

- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts, pre-tests, and PowerPoint slides.

Handouts

- Participant Handout #7: Maternal Health Situation Analysis
- Participant Handout #8: Family Planning Situation Analysis
- Participant Handout #9: Problem Tree
- Participant Handout #10: People Analysis
- Participant Handout #11: Context Analysis
- Participant Handout #12: Qualitative and Quantitative Research Methods
- Participant Handout #13: Research Gaps and Methods
- Participant Handout #14: Summary of Analysis
- Slides #29–#57

SESSION 1

What is Meant by 'Understanding the Situation'?

TOTAL TIME

15 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- describe reasons for conducting situation analysis

INSTRUCTIONS

1. Explain that this module will illustrate how IEC officers can conduct situation analyses to help them build a program that is built on evidence instead of assumptions.

2. Remind participants of the C-Planning process and explain that "understanding the situation" is the first step in a systematic SBCC effort and is an essential step toward program design.

3.  Refer to a pre-populated flip chart page or **PowerPoint slide #31** to explain reasons for conducting situation analyses. Explain that this is Step 1 of the C-Planning process.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #31

'Understanding the Situation' Helps IEC Officers to

- gain insight into the issue the program is addressing from many perspectives
- organize and summarize what is known about the situation
- check assumptions by looking at existing research
- identify gaps and plan for formative research
- focus energies and resources and make decisions
- focus a program effectively on different groups of people (those affected and those who influence them)
- address a problem and its context through complementary SBCC strategies (BCC, community mobilization, and advocacy)

FACILITATOR'S NOTE

It may be useful to elaborate on some of the points on the PowerPoint slide. For example, it is important for IEC officers to gain insight into the problems they are addressing using many perspectives because human behavior is multi-dimensional. Checking assumptions by looking at existing research is needed to ensure that their programs are evidence-based.

4. Ask one or two participants to:

- **(5 minutes)** Provide an example of a time when they conducted a situation analysis related to a problem they were working to address.

FACILITATOR'S NOTE

Call on a different person or group each time you are asking for volunteers to ensure that one person or group does not dominate the training and that everyone has a chance to have their experiences and opinions heard. Find ways that are comfortable to participants to elicit opinions from those who are less vocal or participative.

5. Explain that this session will review three steps IEC officers can take when trying to better understand the situation related to a problem. These include

- organizing what is already known about the situation
- checking assumptions when looking at research
- planning and conducting formative research if needed

FACILITATOR'S NOTE

For IEC officers, planning and conducting formative research may require working with state monitoring and evaluation (M&E) teams or development partners. There are also several ways of conducting basic formative research quickly and inexpensively that will be addressed later in this training.

KEY SUMMARY POINTS FOR MODULE 1, SESSION 1 (POWERPOINT SLIDE #32)

- Understanding the situation is the first step in an SBCC development process.
- Understanding the situation strengthens program development because it allows IEC officers to gain greater insight into the problem, check assumptions, identify gaps, and tailor a program to a variety of audiences, among others.

TOTAL TIME

90 minutes

SESSION 2

Layers of Causes and Effects

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- use a problem tree tool to better understand a problem

HANDOUTS

- Participant Handout #7: Maternal Health Situation Analysis
- Participant Handout #8: Family Planning Situation Analysis
- Participant Handout #9: Problem Tree

INSTRUCTIONS

1. Explain that programs are often tempted to skip a situation analysis because it takes more time, may be perceived as being costly, or may challenge assumptions of other communication programs. As a result, their approach may not always address the causes of the problems that they are trying to address. Therefore, **a limited situation analysis may lead to a limited set of program strategies.**

2. Share that sometimes the best way to start an SBCC effort is to talk with people who have different perspectives, such as:

   - affected individuals
   - community members
   - frontline health care workers
   - key decision makers in the government or community

3.  Ask:

   - **(5 minutes)** Who are the individuals you would typically consult as part of your programs' situation analyses if any? Record answers on the flip chart.

Record on the Flip Chart

Individuals Typically Consulted for Situation Analyses

FACILITATOR'S NOTE

Listen for answers such as:

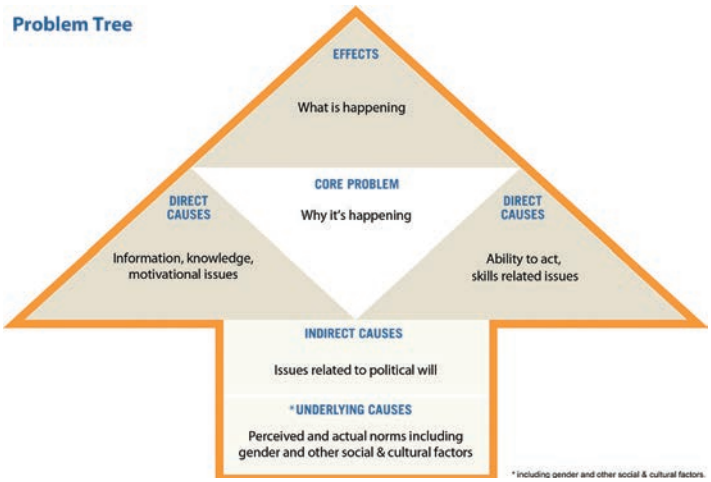
- family members, such as fathers, mothers, mothers-in-law
- frontline health workers, such as ASHAs, ANMs and their supervisors
- community members, such as Gram Pradhan, Sarpanch, religious leaders
- community gatekeepers, such as Imams, Pujaris, RMPs
- MOHFW technical staff, National Rural Health Mission officials, State Program Unit Staff, Chief Medical Officer

4. Describe a problem tree as another tool IEC officers can use to help to better understand the situation. It provides a broad view of the causes of a problem, possible effects, and gives some direction as to how to address a problem or situation most effectively. A problem tree also helps IEC officers determine **what they know** and **what they don't know**.

5. Refer to a pre-populated flip chart page or **PowerPoint slide #34** to show an example of a problem tree.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #22

Problem Tree



6. Point to the appropriate section of the tree and explain:

- The middle of the tree is where we state the *core* problem we are working on.
- The top of the tree states the *effects* of the problem.
- The branches demonstrate the *direct causes* of the problem. These are often related to ***information, skills, and motivation*** issues.
- The top of the tree trunk shows the *indirect causes* of the problem. These are often related to issues of political will or causes related to the community or national environment. This may include ***access*** to materials and services.
- The roots (base of the tree) exhibit the *underlying causes* of the problem, such as perceived and actual ***norms***.
- Explain that developing a problem tree is a collaborative process and should be shared with others to ensure that it resonates and reflects the situation accurately

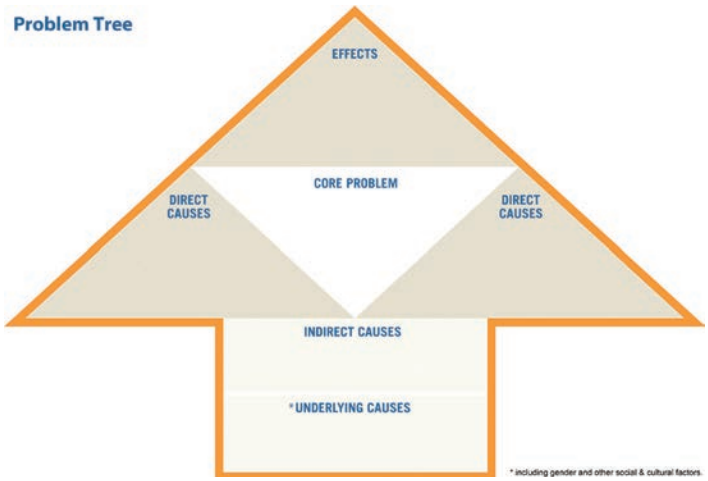
7. Ask:

- **(5 minutes)** Are any of the terms we just used familiar to you? Where have you heard them before?

8. Lead the group in a problem tree example. Draw on the flip chart a blank problem tree.

Record on the Flip Chart

Problem Tree



9. Record, in the center of the tree, the example problem: **Low use of maternal health services/products, such as antenatal care (ANC), iron folic acid (IFA), institutional delivery, and 48-hour stay in India.**

10. **(3 minutes)** Ask participants to consider what the possible effects are of this problem. Record them on the flip chart in the effects box at the top of the tree.

FACILITATOR'S NOTE

Listen for and post answers such as:

- high maternal and infant morbidity rates
- high maternal and infant mortality rates
- high rates of home delivery
- poor birth outcomes
- poor child health
- increased financial burden on families

11. **(3 minutes)** Now ask participants to address some of the direct causes of the problem. Remind them that direct causes often relate to two cross-cutting factors of the socio-ecological model—information and motivation. Post answers on the tree. Put information-related responses to the left of the core problem and put motivation/attitude-related responses to the right of the core problem.

FACILITATOR'S NOTE

Listen for and post answers such as:

- information-related causes:
  - low knowledge of pregnancy and delivery danger signs
  - lack of awareness of skilled birth attendant services
  - low knowledge of JSSK
- motivation/attitude-related causes:
  - lack of importance placed on ANC
  - low risk perception related to delivery
  - myths related to IFA consumption
  - preference for female doctors

12. **(3 minutes)** Ask participants to now address some of the indirect causes of the problem. Remind participants that these issues usually relate to access to services or products, political will, ability to act, and so on. Post these responses in the box immediately below the core problem on the tree.

FACILITATOR'S NOTE

Listen for and post answers such as:

- poor delivery preparedness
- cost of institutional deliveries too high
- weak counseling by frontline workers
- low access to and reach of quality health services
- lack of health facilities in hard-to-reach areas

13. **(3 minutes)** Lastly, ask participants to address some of the underlying causes of the problem. Remind them that these causes typically are related to perceived or actual norms. Post these responses at the bottom of the tree trunk.

FACILITATOR'S NOTE

Listen for and post answers such as:

- non-supportive gender norms
- non-supportive socio-cultural norms

14. **(10 minutes)** Thank participants for their work on the example. Explain that we now are going to break into small groups that we will work with throughout the rest of the training.

- Refer back to the list of health problems that the group is currently addressing in their work (this was put on a flip chart as part of participant introductions in the **Introductory Module, Session 3**).
- Ask participants to break into small groups of four to six people (no more than 5 groups in total) around one of these problems that they would like to address during this training

FACILITATOR'S NOTE

Ensure teams are relatively even in size. It is OK if multiple teams choose to work on the same problem.

› Instruct the small groups to further define their chosen problem. This will be their core problem or communication challenge that they will try to address throughout the course of this training.

FACILITATOR'S NOTE

The core problems that the groups identify to work on need to be specific and include a behavior that requires changing. Their problems should not be generic health conditions. Examples of some problems groups may work on include:

› low use of maternal health services

› lack of male involvement in ensuring a healthy pregnancy

› poor hygiene and sanitation practices, which contribute to under five diarrhea

› low use of modern contraceptive methods

15. Explain to the small groups that they will now work to conduct a situation analysis related to their 'core problem' using a problem tree tool.

16. Hand out **Participant Handouts #7–#8** to participants in their small groups.

› Explain that for those groups working on topics related to maternal health and family planning we have a brief situation analysis prepared for them to review prior to the next exercise.

› **(5 minutes)** Distribute the handouts relevant to each small group and instruct them to take 5 minutes to read the information on the sheet.

FACILITATOR'S NOTE

If there are groups working on problems that are not related to the topics of maternal health and family planning instruct them to take 5 minutes to write down on a piece of paper key facts and information they know about the problem (e.g., general statistics, findings related to audience practices and beliefs).

17. **(15 minutes)** Distribute **Participant Handout #9**. Instruct participants to work in small groups (project groups) to complete a problem tree. Explain that this should be filled out based on what they *know* versus what they *assume* about their problem. Give groups 15 minutes to complete the exercise.

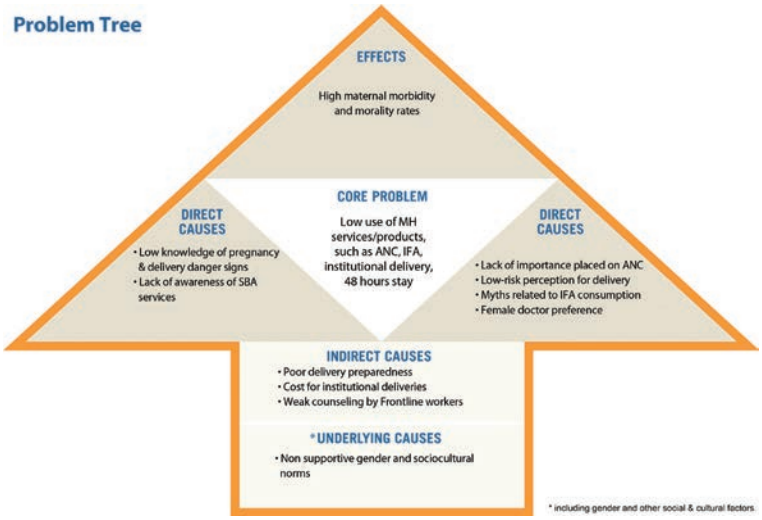
FACILITATOR'S NOTE

Circulate around the room while the small groups are working to provide assistance and feedback. Encourage and praise the groups while they are working. Provide constructive feedback to the groups. For this exercise, look to ensure that groups

- work on a well-defined problem
- identify key information necessary to complete the tree
- consider causes that include information, motivation, ability to act, and norms.

FACILITATOR'S NOTE

A completed problem tree for this issue may look something like this



18. **(5 minutes)** Reconvene participants and ask for one group to present their problem tree to the larger group for comments or questions. Ask if there are any additional questions about completing problem trees and provide any clarification as needed.

19. **(5 minutes)** Ask:

- Was any of the information presented in their problem trees based on assumptions rather than facts, or were there gaps in any of the information they were able to present. If yes, share with the group that these are gaps that would require additional research or attention to complete as part of their situation analyses.
- Did participants feel comfortable completing the problem tree exercise and did they see utility in it?

KEY SUMMARY POINTS FOR MODULE 1, SESSION 2 (POWERPOINT SLIDE #35)

- Limited situation analyses lead to a limited set of program strategies.
- Talking with people who have different perspectives (audiences and key stakeholders) is a good way for IEC officers to begin developing an SBCC program.
- A problem tree tool can help IEC officers better understand the situation of a health problem they are addressing and determine what they know and do not know about that problem.

TOTAL TIME

30 minutes

SESSION 3

People Analysis

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- identify a person most affected by a problem, those directly impacting them, and those indirectly impacting them

HANDOUTS

- Participant Handout #10: People Analysis

INSTRUCTIONS

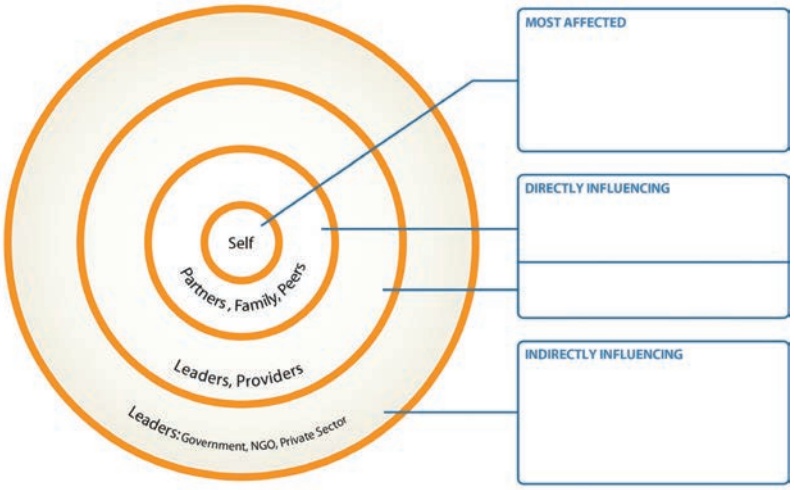
1. Explain that once we have a better idea about the causes and effects of a problem we are working on, that it's good to also look at the people who are *directly affected* by the health and development problem and the people who are involved with or influence in some way the person that is directly affected. Explain that some call these primary audiences, secondary audiences, and tertiary audiences.

2. Explain that another tool that IEC officers can use when trying to better understand the situation is a people analysis tool.

3. Refer to a pre-populated flip chart page or **PowerPoint slide #37** to show an example of the people analysis graphic.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #37

People Analysis



SOURCE: Adapted from McKee, Manoncourt, Chin and Carnegie (2000)

4. Describe the people analysis graphic on the slide.

- In the center (the self) are the people most affected by the problem, or the primary audience. Examples might include:
  - young pregnant mothers
  - mothers of children under 5 with diarrhea
  - mothers of children with newborns with pneumonia/sepsis
- The two intermediate rings (interpersonal and community levels of the socio-ecological model) are people—community organizations, services, or products—who directly influence those who are most affected (the self). Examples might include:
  - husbands
  - mothers-in-law
  - peers
  - doctors, health care providers
  - ASHAs, ANMs, or other frontline health workers
- In the outermost ring (the enabling environment of the socio-ecological model) are people, groups, and/or institutions that indirectly influence those who are most affected (the self). Examples might include:
  - educational institutions
  - university authorities
  - MOHFW
  - legislators and policymakers

5. **(10 minutes)** Hand out **Participant Handout #10**: People Analysis.
   - Break participants into the same small groups they were in for the problem tree exercise (project groups).
   - Instruct participants to fill in the people analysis worksheet based on the problem their group worked on for the problem tree.
   - Allow groups 10 minutes for this exercise.
6. **(10 minutes)** Ask each group to pair off with another group and to present their core problems and people analyses to one another for feedback and incorporation into their analyses. Allow groups 10 minutes for sharing and then reconvene the group.
7. Summarize that in developing SBCC programs, it is important to consider the fact that individuals cannot or may not be motivated to change their behaviors in isolation. It is critical therefore to acknowledge all relevant audiences and address key influencers.
8. **(3 minutes)** Ask participants:
   - Can you think of an example of a health problem that you work on where it is important to communicate with or address not just the primary audience but also secondary and/or tertiary audiences?

KEY SUMMARY POINTS FOR MODULE 1, SESSION 3 (POWERPOINT SLIDE #38)

- There are various layers of audiences—people who are most affected (the self), people who directly influence them, and those who indirectly influence them.
- A people analysis is a tool IEC officers can use to better understand the situation of their health problem and to identify their primary, secondary, and tertiary audiences.
- People cannot change their behavior in isolation, so identifying and addressing multiple audiences are important for an SBCC program to be successful.

SESSION 4

Context Analysis

TOTAL TIME

90 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› conduct a context analysis

HANDOUTS

› Participant Handout #11: Context Analysis

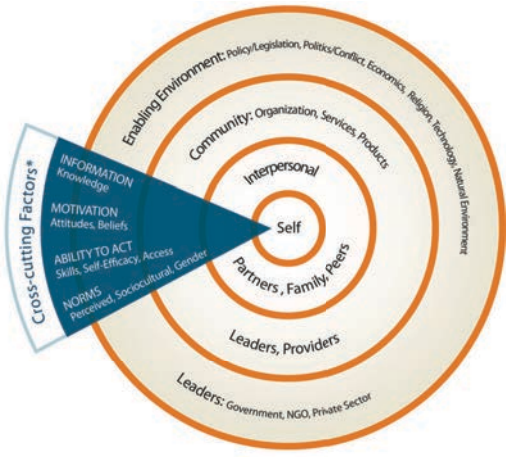
INSTRUCTIONS

1. Explain that in addition to problem trees and people analyses, there are additional context analyses IEC officers can conduct to better understand the situation related to the problem they are seeking to address.

2. Refer participants back to the image of the socio-ecological model by showing them a pre-populated flip chart page or **PowerPoint slide #40**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #40

Context Analysis



*These concepts apply to all levels (people, organizations, and institutions). They were originally developed for the individual level.

SOURCE: Adapted from McKee, Manoncourt, Chin and Carnegie (2000)

3. Explain that the rings/layers of the model and the cross-cutting factors can be used in greater depth to further analyze the situation. Explain to participants that the rings and cross-cutting factors of the socio-ecological model that may be most important to look at include:

   - community, which includes services and products
   - enabling environment, which includes policies, laws, religion, environment
   - information
   - motivation
   - ability to act
   - norms

4. **(20 minutes)** Refer participants to a pre-populated flip chart page or **PowerPoint slides #41–#46** to provide an overview of how these categories can guide us in asking questions and generating answers necessary for us to better understand the situation.

   - Explain that the content on the slide consists of illustrative questions IEC officers could ask. Ask participants to share other related questions that could be important to consider.
   - For each question posed, ask participants to brainstorm responses using the problem of **child morbidity/mortality due to diarrhea**.
   - Ask for a volunteer to post responses on a flip chart.
   - Explain that some information generated through these examples will duplicate what was generated using the problem tree, but this is another approach IEC officers can use to generate this important background information. This approach may allow for IEC officers to dig a bit deeper than the problem tree tool allows for. Take a maximum of 5 minutes per slide and mini-discussion.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #41-#46

Context Analysis: Community-, Services-, and Product-related Questions

- What community assets can support or impede change?
  - For example: if physical examinations are not happening during Village Health and Nutrition days (VHND) because of lack of privacy, can the Panchayat help to shift VHND sites from the Anganwadi Centre to a school with an empty classroom?
- What services and products are accessible at the community?
- What is the quality of services and products available?
- Is transport available for people to access these services?
- What are the costs involved in accessing these services? (think monetary and nonmonetary [e.g. time])?

Context Analysis: Enabling Environment

- What policies or laws exist that support or impede change?
  - For example: Girls cannot get married until age 18 but this law is often not enforced.
- How do political and religious conventions and norms influence these policies?
- Are there any opinion leaders who can support or impede the desired change?
- How can the program work with them?
- What is the condition of the economic, technological, or natural environment as it relates to this problem?

Context Analysis: Information

- What information does each relevant group receive about the health issue?
- How timely, accessible, and relevant is it?
- Through what channels is information received?
- How does your audience react to this information?
- What knowledge is still needed?

Context Analysis: Motivation

- What motivates people in each group to act?
- What are their attitudes and beliefs?
- What appeals to your audience?
- What do they want?
- What key or additional information is missing that could help motivate them?

Context Analysis: Ability to Act

- What life skills do people in each group have?
- What assets, strengths, resources, or access to products and services do they have?
- How confident are they in their ability to create change (efficacy)?

Context Analysis: Norms

- What are the deep underlying values of each group, as reflected in gender and other cultural norms?
- For example: intra-household feeding practices where girls and women eat after boys and men.
- How do these norms affect people's knowledge, attitudes, beliefs, and ability to act (and ultimately their behaviors)?
- How do these values/norms affect or influence the health or development problem?
- Do all people affected and those who influence them have the same or different norms?

FACILITATOR'S NOTE

For responses related to the problem of **child morbidity/mortality due to diarrhea** in the context of:

Community, Services, and Products, listen for and note responses such as:

- lack of safe drinking water
- access to soap, running water, water treatment product
- access to oral rehydration solution, pediatric zinc
- access to medical services (including cost)

The **enabling environment**, listen for and note responses such as:

- contaminated water sources
- lack of sanitation and hygiene practices and regulation and waste disposal

Information, listen for and note responses such as:

- knowledge of how hygiene, sanitation, and safe drinking water are linked with diarrhea prevention and treatment of childhood diarrhea (ORS, zinc)
- knowledge of how to treat water, critical times for hand washing, proper hand washing techniques

Motivation, listen for and note responses such as:

- love and caring for children
- low risk perception related to diarrhea
- desire for a healthy, happy family
- fears about side effects of water treatment products
- lack of time for boiling water

Ability to Act, listen for and note responses such as:

- cost of water treatment (time/money), soap, and other products
- cost of accessing health services
- lack of confidence in ability to prevent diarrhea in home
- poor distribution of ORS and zinc supplements at grass-roots levels
- lack of availability of health facilities in hard-to-reach areas

Norms, listen for and note responses such as:

- gender norms around household responsibilities and decision making, including financial oversight
- norms related to hand washing, sanitation, water treatment
- traditional beliefs related to course of treatment or source of treatment for children with diarrhea

5. Remind participants that the answers to the questions we just posed across the various layers and factors of the socio-ecological model can often be supplied through existing research. To save time and money we want to look at those resources first. But, if there are important, relevant questions that cannot be answered by existing research, then IEC officers will need to explore other means of answering them.

6. Hand out **Participant Handout #11** on conducting a context analysis. Break participants into their project groups. Instruct groups to complete a context analysis as was done in the plenary exercise on diarrhea but instead, using their team's core problem.

   - Explain that a context analysis should be done *by audience.*
   - Refer to the handout and tell participants that we have included space for two audiences—one the self (or the person directly affected), at the middle of their people analysis. The other is for a person directly affecting that person.

FACILITATOR'S NOTE

If participants do not have enough space on the worksheet, recommend they use a blank sheet of paper or flip chart paper to complete their context analyses. Circulate around the room while the small groups are working to provide assistance and feedback. Encourage and praise the groups while they work. Provide constructive feedback to the groups. For this exercise, look to ensure that the groups' analyses are by audience and are consistent with the approach used in the plenary example.

7. **(30 minutes)** Give participants 30 minutes to conduct their context analyses. Instruct them to start with the self (person directly affected) and, time permitting, do the analysis for a person who directly affects that person (e.g., husband, wife, mother-in-law). After about 20 minutes, have participants transfer their work to a flip chart. Remind participants that they began a similar exercise during the Introductory Module when the socio-ecological model was introduced. They began to think about the context in their small groups using Participant Handout #4.

8. **(5 minutes)** Ask participants to hang up their context analyses. Instruct participants to spend 5 minutes moving around the room and viewing each other's analyses. Using sticky notes, have participants write down any feedback and post it next to the relevant analysis for the group's consideration and incorporation in their analyses.

9. **(5 minutes)** Give groups an additional 5 minutes to review any feedback they received and to incorporate it into their analyses.

KEY SUMMARY POINTS FOR MODULE 1, SESSION 4 (POWERPOINT SLIDE #47)

- In addition to problem trees and people analyses, there are additional context analyses that IEC officers can conduct to fill in their situational analysis.
- The socio-ecological model can be used as a guide for conducting a context analysis by looking at both the rings (community, enabling environment) and cross-cutting factors (information, motivation, ability to act, and norms).
- Using the socio-ecological model as a guide for your context analysis ensures a full, holistic picture of the problem.

TOTAL TIME

45 minutes

SESSION 5

Formative Research Gaps and How to Fill Them

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- identify formative research needs

HANDOUTS

- Participant Handout #12: Qualitative and Quantitative Research Methods
- Participant Handout #13: Research Gaps and Methods

INSTRUCTIONS

1. Explain that this session will enable participants to review what we learned through our situation analyses and to identify formative research gaps and ways of possibly addressing them.

- By having reviewed existing data and research, we can explore what additional formative research might be needed.
- Formative research is research conducted to help you develop your program. It can:
  - help you define or learn more about your audience(s)
  - create specific, targeted programs
  - ensure programs are acceptable to your audience and feasible
- Formative research begins by listing the questions the SBCC program hopes to answer.
  - What programs already exist?
  - How feasible is the program we have in mind?
  - What don't we know about the audience's knowledge, attitudes, skills, and behaviors?
  - How do norms influence the situation?

2. Explain: Often the magnitude of the problem is clear, but formative research gaps exist around areas that will affect how IEC officers craft their messages and position their campaign. These link back to the socio-ecological model and may be information, motivation, ability to act (efficacy), or norm-related. Often existing research fails to tell us is what facilitates a desired behavior. Facilitators may include emotional triggers.

3.  Refer participants to pre-populated flip chart pages or **PowerPoint slides #49–#50** to provide an overview of different types of research methods we can use.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #49–#50

Data Methods: Quantitative

- Quantitative methods rely on standardized approaches to collect and analyze numerical data.
- They can be used to investigate almost any phenomena numerically—how many women have gone for ANC visits or how many visits per pregnant woman.
- Quantitative methods tell us who, what, when, where, and how much, as well as how often something is taking place.

Data Methods: Qualitative

- Qualitative data help us to understand the why.
- They generally involve asking semi-structured or open-ended questions whose answers produce in-depth, descriptive information.
- Results help to guide understanding, rather than being able to generalize to a population, such as why something might be taking place or the underlying issues with which individuals or communities are dealing.

4. (5 minutes) Tell participants that we will now review some examples of qualitative and quantitative research methods.

-   Hand out **Participant Handout #12** on quantitative and qualitative methods. Have participants count off by 6 to form six small groups. Assign each group one research method:
  - Group 1: Secondary data analysis
  - Group 2: Key informant interviews
  - Group 3: Public forum
  - Group 4: Focus group discussions

- Group 5: Mapping
- Group 6: Population and sub-population surveys

- Have each group summarize the top two to three most important points about the method they wish to share with the larger group and come up with a brief example of how they used or where they saw that type of method being used in the past.
- Give each group 5 minutes for this assignment.
- Reconvene the group and have each small group present their method.

5. Share with participants that before conducting formative research, it is important to first consider what has already been done. Few issues remain un-researched. IEC officers can save themselves time and money by first looking at the data that are already available to see if they answer their research questions.

6. **(5 minutes)** Ask: What data sources do you go to regularly to inform your programs? Post answers on the flip chart.

Record on the Flip Chart

Go-To Data Sources:

FACILITATOR'S NOTE

Listen for and post answers such as:

1. Demographic and Health Survey (DHS)
2. National Family Health Survey
3. WHO World Health Survey
4. Census of India

7. **(15 minutes)** Hand out **Participant Handout #13**. Break participants into their project groups (the groups that they worked with for the problem tree, people analysis, and context analysis).

- Have them look at their problem tree, people analysis, and context analysis and identify areas where there are research gaps. These may be places where information is unknown or places where the team was only able to make assumptions and their analyses were not based on facts.
- In small groups, discuss what types of formative research might be conducted to fill these gaps or research needs.
- Give teams 15 minutes to discuss.

8. Explain that there is a complementary training being offered that focuses solely on monitoring and evaluation (M&E) for SBCC.

KEY SUMMARY POINTS FOR MODULE 1, SESSION 5 (POWERPOINT SLIDE #51)

- After conducting a situation analysis, IEC officers can better see what information gaps still exist and need to be answered before developing their program.
- Formative research helps answer what programs or resources already exist, how feasible the program you are developing is, and can provide greater information about target audiences, etc.
- There are different types of qualitative and quantitative research methods that can be used to support formative research.
- Existing data sources can also be used to inform your program.

TOTAL TIME

45 minutes

SESSION 6

Summary of Analysis

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- write a problem statement and identify changes the statement calls for

HANDOUTS

- Participant Handout #14: Summary of Your Analysis

INSTRUCTIONS

1. Explain that now we have a solid understanding of the situation related to our core problem, we are going to summarize our analyses to form a problem statement.
2. Refer participants to pre-populated flip chart pages or **PowerPoint slides #53–#56** to provide an overview of a problem statement.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #53–#56

Problem Statements

- Problem statements provide succinct summaries of our situation analyses.
- They help managers see clearly what is happening so they can focus on where their programs will make a difference.
- They are backed up by data.
- They consider the full context and not just individual behaviors.

Problem Statements Tell Us

- What is happening?
- Where and to whom?
- With what effect?
- Who and what is influencing the situation and with what effect?
- As a result of what causes?

Problem Statements Example

What's Happening: High levels of stigma and discrimination

Where and to Whom: In health care settings toward people living with HIV (PLHIV) in India

With what Effect: Causes delays in treatment and non-adherence to treatment

Who and What is Influencing and with What Effect: Fear of HIV transmission in casual and occupational settings among clinical providers and non-clinical staff and moral judgments toward PLHIV

As a Result of What Causes: Deep societal norms of stigma and discrimination toward PLHIV support and reinforce its manifestation within the health care setting

Final Statement

High levels of stigma and discrimination in health care settings toward people living with HIV (PLHIV) in India are causing delays in treatment and non-adherence. Fear of HIV transmission in casual and occupational settings among clinical providers and non-clinical staff and moral judgments toward PLHIV are core reasons for this problem. Deep societal norms of stigma and discrimination toward PLHIV support and reinforce its manifestation within the health care setting.

3. Explain that once we have a problem statement, we can begin addressing the changes that the problem calls for.

4. **(5 minutes)** Ask participants for a few examples of what changes the example problem statement on stigma and discrimination may call for. Post answers on the flip chart.

Record on the Flip Chart

Changes the Problem Calls for:

FACILITATOR'S NOTE

Listen for and post answers such as:

- stigma reduction training for health professionals
- policies for the treatment of PLHIV
- mass media campaigns

5. **(15 minutes)** Hand out **Participant Handout #14**. Break participants into their project groups and instruct them to develop a problem statement based on their core problem and situation analyses. Once completed, they can begin to work on a list of the changes the problem calls for. Give participants 15 minutes to work on this.

6. **(5 minutes)** Reconvene participants into the larger group and ask for one or two teams to share their problem statements with the other groups. Ask if there were any difficulties in developing these.

7. Explain that problem statements can help IEC officers articulate their problem to others and support communication around their program's approach.

8. Thank everyone for their active participation and bridge to Module 2 if continuing for the day.

KEY SUMMARY POINTS FOR MODULE 1, SESSION 6 (POWERPOINT SLIDE #57)

- A problem statement will allow IEC officers to present a succinct summary of their situation analysis.
- It helps IEC officers define the problem and see what is happening so they can focus their resources appropriately.
- Problem statements tell us what is happening, where and to whom, with what effect, who and what is influencing the situation, and as a result of what causes.
- Problem statements can help IEC officers articulate their problem to others and support communication around their program's approach.

MODULE 2

Focusing and Designing

TOTAL TIME

7.5 hours
(not including breaks)

LEARNING OBJECTIVES

By the end of this session, participants will be able to (**PowerPoint Slide #58**):

- describe two elements of a communication strategy
- describe why a communication strategy can also be a program management tool
- outline a communication strategy
- define audience segmentation, prioritization, and profiling
- use a Matrix for Change to devise a communication strategy
- explain what SMART objectives are
- define strategic approaches
- define positioning
- describe the importance of mixing program activities, channels, and materials

OVERVIEW

Session	Title	Duration
1	Communication Strategy Overview	30 minutes
2	Audience Segments, Priorities, and Profiles	60 minutes
3	Barriers and Facilitators to Change	60 minutes
4	Communication Objectives	60 minutes
5	Strategic Approach and Positioning	60 minutes
6	Channels, Activities, and Material Mix	90 minutes
7	Refinement and Presentation of Communication Strategy	30 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation and pre-tests
- LCD projector (if available)
- sticky notes

Advance Preparation

- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts and PowerPoint slides.

Handouts

- Participant Handout #15: Communication Strategy Overview
- Participant Handout #16: Communication Plan Outline
- Participant Handout #17: Audience Segment Mapping
- Participant Handout #18: Checklist for Audience Prioritization
- Participant Handout #19: Matrix for Change
- Participant Handout #20: Communication Objective Examples
- Participant Handout #21: Strategic Approach and Positioning Statement
- Participant Handout #22: IPC as a Communication Channel
- Participant Handout #23: Mid-Media as Communication Channels
- Participant Handout #24: Mass and Social Media as Communication Channels
- Participant Handout #25: Draft List of Activities with Matching Channels and Materials by Audience
- Slides #58–#97

SESSION 1

Communication Strategy Overview

TOTAL TIME

30 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- describe two elements of a communication strategy
- describe why a communication strategy can also be a program management tool
- outline a communication strategy

HANDOUTS

- Participant Handout #15: Communication Strategy Overview
- Participant Handout #16: Communication Plan Outline

INSTRUCTIONS

1. Congratulate the group for completing Module 1: Understanding the Situation.

2.  Explain to the participants that we will now focus and design our program by developing a communication strategy. Refer to a pre-populated flip chart page or **PowerPoint slide #60** to provide an overview.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #60

Communication Strategies

- A communication strategy is a document that
  - allows programs to focus on specific audiences
  - presents an overarching approach to designing activities, materials, and products
  - pinpoints potential communication strategies and channels for communicating information for a specific purpose
  - specifies strategy feedback mechanisms
- Why develop a communication strategy?
  - It provides direction and ensures products, materials, and activities all work together and support a clear vision of change.
  - It guides decisions and ensures that the plan is implemented according to decisions made.
  - It encourages action, builds consensus, promotes community participation, resolves conflict, and elicits input.
- When do you develop a communication strategy?
  - after conducting a situation analysis
  - before implementing an SBCC program

3. **(5 minutes)** Ask participants:

- Has anyone developed a communication strategy before?
- If so, how was it used?

FACILITATOR'S NOTE

Listen for and post answers such as:

If the group is inexperienced working with communication strategies, skip the question. Only take a few answers, since this is a short exercise.

4. Tell participants that there many formats a communication strategy may take, but all strategies contain the same information; it just may be presented or organized a little differently.

5. Hand out **Participant Handout #15** that provides the communication strategy overview that we will use in this training and give participants a minute or two to look at it. Using this handout or on a flip chart, present the major components of a communication strategy and remind participants that we are in Step 2 of the C-Planning process—which is focusing and designing our program.

6. Explain to participants that a communication strategy can be a useful program tool for program management. Refer to a pre-populated flip chart page or **PowerPoint slide #61**.

Turn to Pre-Populated Flip Chart Page with the Content Below or PowerPoint Slide #61

Using a Communication Strategy as a Management Tool

- A communication strategy can guide how programs will be implemented.
- It can be reviewed to see if new ideas are in line with the strategy.
- If resources are tight, the strategy can determine priorities for funding.
- If unexpected challenges emerge, the strategy can be consulted to determine if they affect the way forward.

A communication strategy shouldn't limit a program's ability to shift direction. At the same time it can keep managers mindful of the approach being taken.

7. Hand out **Participant Handout #16**: Communication Strategy Outline. Tell participants that we will use this worksheet as a guide to develop their communication plan—Part 2 of the outline.

8. Explain that participants already completed Part 1 of the strategy outline as part of the situation analysis and problem statement definition we conducted earlier in the training. This was the first step of the C-Planning process.

9. **(10 minutes)** Have participants re-group into their project teams and complete Part 1 of the communication strategy handout based on work completed in Step 1. Instruct participants:
   - Re-group into project teams.
   - Review Part 1 of the communication strategy (situation analysis) on the handout (**#21**).
   - Complete Section 1 based on the work they had completed in Step 1 of C-Planning (the last module).
   - Give teams 10 minutes to complete this exercise.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 1 (POWERPOINT SLIDE #62)

- A communication strategy is a document that allows IEC officers to present an overarching approach to the design of their activities, materials, and products.
- Communication strategies provide direction, guide decisions, encourage action, and build consensus.
- They are developed in a participatory manner.

SESSION 2

Audience Segments, Priorities, and Profiles

TOTAL TIME

60 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› define audience segmentation, prioritization, and profiling

HANDOUTS

› Participant Handout #17: Audience Segmentation Mapping

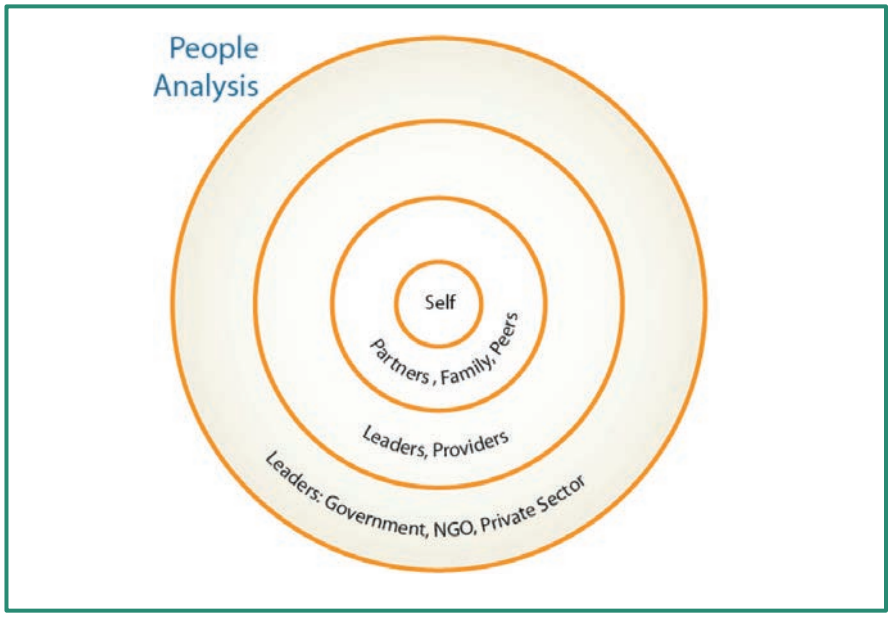
› Participant Handout #18: Checklist for Audience Prioritization

INSTRUCTIONS

1. Tell participants that we will be working on Part 2 of the communication strategy outline—the communication plan. The first part of a communication plan involves naming, segmenting, prioritizing, and profiling our audiences.

2.  Remind participants that they have identified potential audiences in Step 1 (Understanding the Situation), when they conducted a people analysis. Refer to a pre-populated flip chart or **PowerPoint slide #64** to remind participants of the people analysis.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #40



3. Explain that before diving into the content, we will take a few moments to define a few terms and why we are doing these activities. Refer to a pre-populated flip chart page or **PowerPoint slide #65** to provide these definitions.

Turn to Pre-Populated Flip Chart Page with the Content Below or PowerPoint Slide #65

Audience-related Activity Definitions

Segmenting divides and organizes populations into smaller groups or audiences with similar communication-related needs, preferences, and characteristics.

Prioritizing helps us determine what audiences we should focus on.

Profiling or describing allows us to imagine what the audience looks like and what their communication needs could be by personalizing audience members.

4. Explain that we will begin to develop our communication plan with an audience segmentation activity and will use the socio-ecological model again to guide us. Refer to a pre-populated flip chart page or **PowerPoint slide #66** to explain different ways we can segment or organize our target audience.

Turn to Pre-Populated Flip Chart Page with the Content Below or PowerPoint Slide #66

How to Segment Audiences using the Socio-Ecological Model

Enabling Environment

- Geographic or structural differences (e.g., urban/rural, risk settings, work place or residence)

Community

- Demographic and socio-cultural differences (e.g., age, gender, education, income, marital status, role in society, religion, ethnicity)

Interpersonal

- Psychosocial differences (e.g., identity, lifestyle, group membership)

Self

- Psychological differences (e.g., knowledge/information, motivation, perceptions of vulnerability, readiness for change, values, attitudes)

5. Explain that we will go through an example of segmenting audiences together using the same example as used for the problem tree tool.

- *The problem is the **low use of maternal health services/products***, such as antenatal care (ANC), iron folic acid (IFA), institutional delivery, and a 48-hour stay. For this example, let's say that our primary audience is women ages 16–49.

6.  **(5 minutes)** Ask and write responses on a flip chart:

- How can we segment our audience, women ages 16–49 (a potential audience for this problem) keeping in mind geographic/structural, demographic, socio-cultural, psychosocial, and psychological differences?

Record on the Flip Chart

Audience Segmentation—Women ages 16–49

FACILITATOR'S NOTE

Look for and post answers such as:

- urban, peri-urban, and rural
- hard-to-reach locations and easier to reach locations
- age
- religion
- education level
- marital status
- membership in groups
- knowledge of services
- motivation (e.g., perceptions of vulnerability, pregnancy risk perception)

7. Remind participants that we segment based on differences in *communication needs*—this means types of information needed and preferences in communication style. Reinforce that different audiences have different communication needs as do different audience segments. Audience segmentation is based on the assumption that different groups within an audience category have different characteristics that influence the extent to which they pay attention to, understand, are motivated by, and act on different messages.

8. **(5 minutes)** Give an example segmenting in a way that appears to be a natural division but where segmentation may not actually be necessary—e.g., by state—would a woman in Bihar who was otherwise similar have different communication needs than a woman in Uttar Pradesh? What about a woman in Bihar as compared with a woman in Kerala?

9. After completing the exercise, explain that the participants will now practice segmenting audiences for their own projects.

10. **(10 minutes)** Hand out **Participant Handout #17**: Audience Segmentation Mapping.
    - Break participants into their project groups.
    - Instruct them to review their people analysis and segment the primary audience for the core problem they have identified.
    - Give teams 10 minutes to complete this exercise.

11. **(5 minutes)** Ask one group to share their audience segmentation with the larger group.

12. Tell participants that now we will work on prioritizing the audiences we have just completed segmenting. Explain that once audiences are segmented there may be a need to narrow down the possibilities and the number of audience segments. Refer to a pre-populated flip chart page or PowerPoint slide #67 and provide guidance on prioritizing segmentation.

Turn to Pre-Populated Flip Chart Page with the Content Below or PowerPoint Slide #67

Segmentation Prioritization

For each audience segment consider:

1. How many people are estimated to be in this group?
2. Does this group require specially prepared communication approaches or materials?
3. How important is addressing this group to achieving the program goal?
4. How likely is it that these audience members will change within the time frame of the program?
5. Does the program have the resources to address this group?

FACILITATOR'S NOTE

Usually most groups do not need to go through a full example answering these questions. However, if you find your group is confused about how to prioritize audiences, take them through an example of prioritizing a few segments listed in the previous exercise.

13. **(10 minutes)** Hand out **Participant Handout # 18**: Checklist for Audience Prioritization.

- Break participants into small groups if not already still in them.
- Instruct groups to use Handout #18 to help them determine who their priority audience segments will be based on the previous segmentation exercise.
- Give groups 10 minutes to complete this exercise.

14. **(5 minutes)** Call time and ask:

- In general, did you end up maintaining most of your identified audience segments after prioritization or were only a few kept? Why?

15.  Explain that now that we have segmented and prioritized our audiences, we can use something called an audience profile to help us further define to whom we are targeting our communication.

- Explain that we do not have enough time for groups to complete an audience profile during this training, but an example is provided in the ***Creating SBCC Campaigns Toolkit***, booklet A.

16. Congratulate participants for completing this session and remind participants we will use this information to complete the next section of the communication plan—barriers and facilitators.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 2 (POWERPOINT SLIDE #68)

- Audience segmentation allows IEC officers to organize populations into smaller groups with similar communication needs.
- Once segmented, audiences need to be prioritized to help determine those that we should focus on.
- Audiences can be segmented using a socio-ecological model based on characteristics pertaining to an enabling environment, the community, interpersonal characteristics, as well as individual differences.

SESSION 3

Barriers and Facilitators to Change

TOTAL TIME

60 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› use a Matrix for Change to devise a communication strategy

HANDOUTS

› Participant Handout #19: Matrix for Change

INSTRUCTIONS

1. Tell participants, programs have been trying to create change relating to family planning, malaria, HIV prevention, and other health and development issues for the last 20 to 30 years.

2.  **(5 minutes)** Ask:

   › Why do countries, states, regions and communities still deal with these and other similar problems given the attention they have received to date?

Record on the Flip Chart

Participants' answers to the question, Why are countries, states, regions, and communities still grappling with these and other similar problems?

3. Remind participants of the five key facts about human behavior that we discussed in the Introduction and refer to a pre-populated flip chart page or **PowerPoint slides #70–#71** to revisit these.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #70–#71

5 Key Facts about HUman Behavior

1. People give meaning to information based on the context in which they live.
2. Culture and networks influence people's behavior.
3. People cannot always control the issues that determine behavior.
4. People's decisions about health and well-being compete with other priorities.
5. People often make decisions based on emotional factors, not logic.

Thinking Big

- When thinking about human behavior, social change, and barriers to change, we need to think **"big"** and **"out of the box."**
- For example, it may seem that a barrier that keeps a young woman from protecting herself from HIV is lack of knowledge about condoms, but the bigger barriers might be her lack of hope for her future, lack of power, fear of conflict in her relationship, or her inability to speak her mind.
- Remember! When we examine barriers to change, we need to rely on data, not assumptions.

4. Tell participants to keep these points in mind as we go through this session identifying barriers and facilitators to change.

5. **(5 minutes)** Hand out **Participant Handout #19: Matrix for Change**.

- Ask participants to read through the first three columns of this example silently—these include Desired Change, Barriers, and Facilitators for Change.

6. Ask participants if they have any questions on the example.

7. **(20 minutes)** Using the same hand out (**#19**), break participants into their small project group teams. Instruct participants to

- Develop desired changes (2-5) for *one* priority audience (refer participants back to desired changes developed during the problem statement exercise earlier in the training). Desired changes may relate to information, motivation, ability to act, social norms, policies, services, community structures.
- For each desired change, note the barriers—why the audience is not performing the desired behavior (refer to problem tree and context analyses).
- Also for each change, note behavioral facilitators. What exists that will help your audience overcome the barriers to change?
- Instruct participants to ignore the Communication Objective column on the worksheet for now. We will come back to this later.

FACILITATOR'S NOTE

Ensure participants are completing this exercise for a primary audience segment as developed during the audience segmentation exercise.

8. **(5 minutes)** Call time and ask one group to present their Matrix of Change.

9. Tell participants, now that they have identified their audiences, the desired changes, and known barriers, we will take a look at developing communication objectives that will name ways to *address barriers in order to achieve the desired change.*

KEY SUMMARY POINTS FOR MODULE 2, SESSION 3 (POWERPOINT SLIDE #72)

- As IEC officers, when we think about changing behavior, we need to fully understand the barriers people face as well as facilitators for behavior change.
- When examining barriers and facilitators, focus on data, not assumptions.
- The changes we desire as IEC officers need to be defined and may pertain to information, motivation, ability to act, norms, policies, services, and community structures.

TOTAL TIME

60 minutes

SESSION 4

Summary of Analysis

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- explain what SMART objectives are

HANDOUTS

- Participant Handout #19: Matrix for Change (continued use)
- Participant Handout #20: Communication Objective Examples

INSTRUCTIONS

1. Explain that we will begin forming communication objectives based on barriers and facilitators to change we arrived at in the last session. Refer to a pre-populated flip chart page or **PowerPoint slides #74–#76** to present further information on communication objectives.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #74–#76

Communication Objectives

Communication objectives answer the following questions:

- What do you want your audience to change? (Note: Objectives should be based on your audience.)
- Why isn't this already happening (i.e., what are the barriers)?
- Which of these barriers will you address with communication?

Communication Objectives (continued)

Communication objectives are more than specific desired behaviors—they are ways to address barriers in order to achieve desired changes in policies, social norms, or behavioral determinants.:

- specific policies, services, social norms, and/or behaviors for each audience
- information, motivation, ability to act, and norms the program should address
- exactly what the program wants the intended audience to *know*, *feel*, or *do* after being exposed to activities and materials

SMART Communication Objectives

Managers should aim for SMART objectives by checking that they are

(S) Specific	Does the objective specify what it aims to achieve? Does it cover only one activity versus multiple activities?
(M) Measurable	Can the objective be measured or counted in some way?
(A) Attainable	Is the objective doable? Can the program attain it?
(R) Realistic	Can the program realistically achieve the objective with the resources and time available?
(T) Time-Bound	Does the objective indicate when it will be achieved?

2. Remind participants that the cross-cutting factors (information, motivation, ability to act, and norms) of the socio-ecological model can be used as a guide to develop communication objectives.

-   Hand out **Participant Handout #28: Communication Objective Examples** and provide a few examples in plenary using a pre-populated flip chart page or **PowerPoint slides #77–#78**.
- Run through one or two examples given using the **SMART** check list to illustrate how these objectives fit the **SMART** criteria. Ask for participant volunteers to read some of the examples.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #77–#78

Communication Objectives Examples

Information: By the end of the program, there will be an X% increase in women ages 15–29 *who know* at least three pregnancy danger signs.

Motivation: By the end of the program, there will be X% increase in women ages 15–29 *who believe* they will have a healthier baby if they attend all ANC sessions.

Ability to Act: By the end of the program, there will be an X% increase in ASHAs who *feel confident* talking with women ages 15–29 about family planning.

Norms: By the end of the program, there will be an X% increase expectant fathers *who believe other men in their communities* accompany their spouses to ANC.

Example 1: Is it SMART? Why or why not?

Communication Objectives Tips

- Use action verbs to help break down desired changes into doable and realistic communication objectives.
- Use verbs like: know, have a positive attitude toward, consider discussing, talk about, feel confident in, practice, use skills.

Remember: Communication objectives are not program objectives—we are measuring how we are addressing barriers to change (or behavioral determinants) with these types of objectives—not specific behaviors or health outcomes.

3. Ask participants if they have any questions about communication objectives.

4.  **(15 minutes)** Ask participants to look at **Participant Handout #19**: Matrix for Change again. This is the handout that they started to fill in with their desired changes and barriers or facilitators.

-  Break participants into their small project groups.
- For one or two desired changes developed, ask them to develop a SMART communication objective.

- Remind participants to consider the cross-cutting factors of the socio-ecological model (information, motivation, ability to act, norms) as a guide when developing their objectives.
- Give groups 15 minutes to develop one or two objectives and call time.

5. **(5–10 minutes)** Have each group post one communication objective on a piece of paper up on the wall or on a flip chart. Ask groups to pair off and review another group's example. Using the SMART criteria, have them provide feedback on whether the objective is a SMART communication objective.

FACILITATOR'S NOTE

Post SMART criteria on a flip chart page or display the PowerPoint slide that contains this content so that participants can view it during this exercise.

6. Tell participants, now that they have completed their communication objectives, it is time to think about how they will bring it all together in a strategic approach and positioning for their campaign.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 4 (POWERPOINT SLIDE #79)

- IEC officers can use communication objectives to help define what they want their audience to change.
- Communication objectives address barriers to change to achieve the desired results.
- SMART communication objectives are specific, measurable, attainable, realistic, and time bound.

TOTAL TIME

60 minutes

SESSION 5

Strategic Approach and Positioning

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- define strategic approaches
- define positioning

HANDOUTS

- Participant Handout #29: Strategic Approach and Positioning Statement

INSTRUCTIONS

1. Explain to the participants that in this session we will be reviewing strategic approach and positioning. Turn to a pre-populated flip chart page or **PowerPoint slides #81–#84** to present these definitions and some considerations.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #81–#84

Strategic Approach and Positioning

Strategic approach is the way a communication intervention is *packaged or framed* into a single program, campaign, or platform.

Positioning presents an issue, service, or product so it stands out from others and motivates certain reactions, changes, attitudes, and behaviors.

Developing the strategic approach and positioning statement is an iterative process, which requires going back and forth to ensure they are aligned and clearly capture the campaign.

Use SBCC key strategies to guide you. Remember these are 1) advocacy, 2) social mobilization, 3) behavior change communication.

Strategic Approach Considerations

1. What needs to happen and where should the program focus?
2. How will the change happen?
3. What is the approach to change?

A strategic approach could take many directions to meet the communication objective of increasing by X% the number of pregnant women ages 15–29 who have institutional deliveries. For example:

- Focus on facilities by developing a strategy that emphasizes friendly, accessible quality services for pregnant women and their husbands.
- Concentrate on the pregnant women by stressing activities and messages that focus on perception, risks of pregnancy, and self-efficacy to ensure an institutional delivery.
- Package the information to focus on a couples' ability to discuss, select, and ensure an institutional delivery as a healthy choice while supporting training and increasing health care workers' ability to provide quality IPC, and supporting an enabling media environment to increase knowledge and motivation for institutional delivery.

Example: Strategic Approach for Maternal Health in India (Choice 3)

The strategic approach is to create a supportive environment for young couples to discuss, select, and use a hospital/institution for delivery of their baby. The program will: 1) work with men and women directly to address benefits of delivering in an institution; 2) provide support to health care workers on FP/RH/IPC to increase the quality and their ability to provide friendly and accurate counseling sessions; and 3) increase the quality and quantity of positive media coverage of a hospital delivery, highlighting a young couple's story and of the benefits of an institutional delivery.

2. Ask participants if they have any questions.

3.  Explain to the participants, once we have a draft strategic approach we can develop a positioning statement. Refer to a pre-populated flip chart page or **PowerPoint slides #85–#86**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #85–#86

Positioning

- Positioning presents an issue, service, or product so that it stands out from others and motivates reactions, changes, attitudes, and behaviors.
  - A positioning statement describes how a proposed change will be seen in the minds of the audience.
  - It is not a catchy slogan, but rather provides direction for message design.
  - It creates a memorable cue for the audience to recognize program activities as part of an overall campaign or program.
  - Positioning provides direction for the program's overall message design, so you need to make sure you get it right!

Example: Positioning Statement for Maternal Health in India

Positioning statement: First-time parents can enjoy their pregnancies and their lives more by feeling re-assured that institutional deliveries are the safest, healthiest way to start their family.

After developing your positioning statement, we can check to see if it resonates with our audience by using this checklist:

- Will the positioning resonate with members of the target audience?
- Will it resonate over time, say a year from now?
- Is it different from what similar programs are offering?
- Does it represent something better or different than the known alternative?
- Does it provide a benefit that is worth the cost or effort?
- Can the program deliver the promise and/or benefit?

4.  **(5 minutes)** Ask participants to give an example of how two similar products in India are positioned differently (e.g., perhaps a soft drink, different condom brands, two similar cars).

5. Hand out **Participant Handout #21: Strategic Approach and Positioning Statement**. Tell participants that an example strategic approach and positioning statement are on this worksheet.

6. **(20 minutes)** Ask participants to form project teams and to develop their own strategic approach. Tell participants that because of time we will not be able to practice developing position statements but that we are providing further information for them so that they can do this on their own. Instruct small groups to

   - use the SBCC key strategies of BCC, advocacy, and community mobilization when determining their strategic approach
   - think about how they will achieve their communication objectives with their overarching approach
   - give teams 20 minutes

FACILITATOR'S NOTE

Circulate and provide assistance to groups in completing their strategic approach as needed. If one group excels more than others in this exercise, ask them to help you in providing feedback to the other groups during the plenary presentation. Explain we will not be going into positioning at this time but the hand-out has further instruction on this.

7. **(5 minutes)** Call time and ask one group to share their strategic approach. Address any remaining questions.

8. Congratulate participants on completing this session. Tell participants that in the following session we will determine what channels, materials, and activities will need to be developed to complete our communication strategy.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 5 (POWERPOINT SLIDE #87)

- Developing a strategic approach will allow IEC officers to package their communication interventions into a single platform, program, or campaign.
- Positioning will allow IEC officers to present their issue, product, or service in a way that motivates a reaction or change among their audience(s).

TOTAL TIME

90 minutes

SESSION 6

Strategic Approach and Positioning

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- describe the importance of mixing program activities, channels, and materials

HANDOUTS

- Participant Handout #22: IPC as a Communication Channel
- Participant Handout #23: Mid-Media as Communication Channels
- Participant Handout #24: Mass and Social Media as Communication Channels
- Participant Handout #25: Draft List of Activities with Matching Channels and Materials by Audience

INSTRUCTIONS

1. Tell participants that we will now start thinking about the activities, channels, and materials needed to achieve our communication objectives and roll out our strategic approach.

2. Explain that this is the last section of the communication plan that we have been working on.

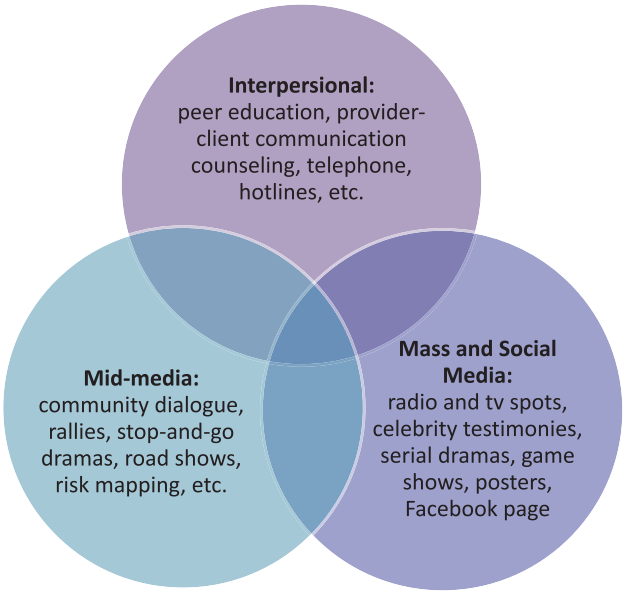
3. Share with participants the need in SBCC to have multiple, mutually reinforcing communication channels in order to optimize change.

   - Refer to a pre-populated flip chart or **PowerPoint slides #89–#90** to provide more information.
   - Refer participants to the ***Creating SBCC Campaigns Toolkit*** resources, booklet A on this topic.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #89–#90

Questioning "which channel to use" is outdated. Rather:

1. Health communication practitioners often think in terms of three basic channel types represented in the graphic below.



› The greatest impact is achieved by combining communication channels and using reinforcing messages, repeating messages and common creative elements among channels to help facilitate change.

4. **(5 minutes)** Ask the group and record on a flip chart:

› Are there any additional methods/activities that you have used that fall under these channels?

FACILITATOR'S NOTE

This is a quick exercise. Do not spend too much time on where methods/activities belong, but point out what is important—that channels support and reinforce each other.

FACILITATOR'S NOTE

Explain to the group: Mid-media are community-based activities and include entertaining activities that also educate and reach large (more then 20-30) groups of people at one time. They usually have audience participation or question time. Often there are diverse audiences participating and the activity is usually repeated in many different locations.

5. After spending a few minutes on the activity above and clearing up questions about channels, explain to the participants that the selection of channels requires thinking about which will work best for the campaign.

6. Refer to a pre-populated flip chart page or **PowerPoint slides #91–92** to provide further guidance on channel selection.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #91–#92

Factors to Consider When Selecting Communication Channels (Continued)

- Desired reach: Programs that aim at national or regional coverage often use mass media as one of the channels.
  - Media habits and preferences of intended audiences:
  - media access
  - audience media habits that exist
  - preferred listening times, favorite stations, programs, perception of media
  - media ownership
- Budget available:
  - development of the products
  - production costs
  - duplication and airing
  - distribution of the communication products

Factors to Consider When Selecting Communication Channels (Continued)

- Complexity of the issue: IPC/counseling channels are effective for all messages but are required communication when the targeted behaviors are
  - complex
  - multi-step
  - implemented over a long duration (breastfeeding, infant feeding, using a condom or other FP methods)
- Sensitivity of the issue: Highly sensitive issues may be better addressed with mid-media/community activities and IPC. This may depend on social norms (e.g., around sexual behaviors).
- Literacy: Low literacy levels rule out print materials and mobile technologies with extensive text.

7. 

(15 minutes) Ask participants to count off by three to form small groups. Hand out **Participant Handout #22** to group 1, **Participant Handout #23** to group 2, and **Participant Handout #24** to group 3.

- Instruct teams to read their hand out and discuss within their group.
- Ask teams to review the advantages and disadvantages listed for their assigned channel, to add feedback from their own experiences, and to strategize ways they could avoid these potential drawbacks when using that channel in their programs.
- After 15 minutes, reconvene the group and have a volunteer from each group present (2 minutes each) their group's
  - communication channel
  - two-to-three top benefits of that channel (from the handout or their own experiences)
  - two-to-three top drawbacks of that channel (from the handout or their own experiences)
  - one-to-two ways that they could overcome those drawbacks when using the channel

FACILITATOR'S NOTE

For IPC, look for responses such as:

- Develop training videos or other media to ensure consistency.
- Make material monitoring part of supervision responsibilities.
- Provide routine training and refresher courses.
- Have providers set reach targets to achieve each month.
- Recognize providers who do an excellent job on IPC, using community forums, radio, and so on.

For mid-media, look for responses such as:

- Provide implementation guidelines during training (such as appropriate sites, target groups, how to recruit, length of time, expected numbers, and frequency of implementation in order to achieve objectives).
- Provide a planning tool to clarify steps, approvals, and documentation.
- Have other organizations participate to see how it is done.
- Monitor implementation to ensure adherence to messages.

For mass and social media, look for responses such as:

- Research costs prior to developing a channel mix.
- Develop a media plan with various cost scenarios.
- Consider selecting an alternative lower cost channel when budget is a problem.
- Share costs with other projects/departments with overlapping objectives.
- Look at existing research or do a quick assessment to ensure that your audience has access to the infrastructure required
- Monitor actual implementation and recall of messages; adjust media plan if not achieving results.

8.  **(15 minutes)** Remind participants that in determining what channels to use, not only are the benefits and drawbacks considered, but the audience's preferences. Turn to a pre-populated flip chart page or **PowerPoint slides #93–#94**. In plenary, have the group map out the typical day of a pregnant woman in Rajasthan. Ask for a volunteer to record responses on a flip chart.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #93–#94

Determine what Channels Reach your Audience

Selecting a channel that reaches the intended audience is important.

- Think about:
  - What is their preferred channel?
  - When does this channel reach them?

One way to do this is to map a day in the life of an audience member. Consider for each audience:

- Where are they in the morning?
- What channels do they see or hear?
  - Do they listen to the radio?
  - Watch TV?
  - Go to the clinics?

For an example target audience of pregnant women ages 15–29 in Assam, let's map out her day together.

Time of Day	Where is She?	What Communication Channels Reach Her?
Early morning		
Mid-morning		
Mid-day		
Early afternoon		
Late afternoon		
Early evening		
Dinner		
Special Events		
Seasonal Events		

FACILITATOR'S NOTE

Take participants through each of the times of day and ask:

- Where is she at xx time of day?
- Even if she is there, is this the best time to reach her with your message/intervention?

9. **(30 minutes)** Hand out **Participant Handout #25**: Draft List of Activities with Matching Channels and Materials by Audience.

- Break participants into their small project groups.
- Instruct small groups to brainstorm using the worksheet on channels, activities, and materials that will help them best implement their strategic approach and appropriately reach their primary audience. Participants should select one of their audience segments (as identified in the audience segmentation exercise) for this activity.
- Give participants 30 minutes to work on this activity.

FACILITATOR'S NOTE

What to look for during the exercise:

- All three channels are used (interpersonal, mid-media, mass/social media).
- Placement and materials are consistent with budget constraints.
- There aren't too many materials, especially things that have little real impact such as cups or t-shirts, unless well justified.

Participants will not have time to complete this activity in full, but the time allotted should give them an idea of the considerations involved in selecting activities, channels, and materials for their programs

10. After 30 minutes call time and congratulate participants for completing the components of their draft communication strategy for their various projects.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 6 (POWERPOINT SLIDE #95)

- In SBCC, we do not think about communication in terms of one communication channel but consider instead a channel mix (e.g., interpersonal, mass and social media, and mid-media).
- IEC officers can have the greatest impact when they combine channels and use reinforcing messages.
- IEC officers should consider their desired reach, audience habits and preferences, and budget when determining their channel mix.
- They also should consider the complexity of the issue they are communicating, its sensitivity, and the literacy of their audience.

TOTAL TIME

30 minutes

SESSION 7

Refinement and Presentation of Communication Strategy

HANDOUTS

› Participant Handout #16: Communication Plan Outline (continued use)

INSTRUCTIONS

1. Remind participants that developing a communication plan is a process. Now they need to go back and refine the plan to make sure it is accurate.

2.  **(15 minutes)** Have participants return to **Participant Handout #15: Communication Strategy Outline** and break into their small group project teams. Using flip chart paper, have participants write out their communication plan in brief and post it on the wall for others to view. Call time after 15 minutes.

3. **(10 minutes)** Ask participants to rotate around the room and view other groups' strategies. Provide sticky notes for participants to write and post any constructive comments or suggestions for groups to consider.

4. Congratulate the group for completing Step 2 in C-Planning for this training. Remind the group that the next step is Creating, where they will bring the materials they decided on to life.

KEY SUMMARY POINTS FOR MODULE 2, SESSION 7 (POWERPOINT SLIDE #97)

› Developing a communication plan and strategy is a process.

› IEC officers can ensure the process is participatory and based on solid situation analyses in order to strengthen their approach's acceptability and success.

MODULE 3

Creating

TOTAL TIME

6 hours
(not including breaks)

LEARNING OBJECTIVES

By the end of this session, participants will be able to (**PowerPoint Slide #98**):

- explain the benefits of conducting a material inventory
- list the various components of a creative brief
- develop a message brief component of a creative brief
- list the Seven Cs of effective messages
- list several considerations for drafting and reviewing materials
- describe key steps in engaging and working with a creative agency
- explain concept testing and pretesting
- describe considerations related to ensuring design and production quality

OVERVIEW

Session	Title	Duration
1	Getting Ready to Create	60 minutes
2	Using a Creative Brief to Develop Materials	90 minutes
3	Effective Messages	45 minutes
4	Drafting and Reviewing Materials	45 minutes
5	Working with Creative Agencies	45 minutes
6	Concept Testing and Pretesting	45 minutes
7	Finalizing Designs and Getting Ready for Production	30 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation and pre-tests
- LCD projector (if available)
- several color printed pictures of posters used in Session 3 (if PowerPoint is not being used)

Advance Preparation

- Prior to the workshop, ask participants to bring communication materials they have developed for their projects (e.g., posters, job aids, brochures) or other materials they think are useful to the workshop. Collect them before starting Module 3 and set up a display area for them during Session 1.
- Bring additional communication materials (including materials developed by the Improving Healthy Behaviors Project, if possible) in case participants do not remember to bring theirs to the workshop.
- Prior to Session 1 of this module, set up a "marketplace" of communication materials, displaying the various items participants have brought.
- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts and PowerPoint slides

Handouts

- Participant Handout #26: Inventory of Existing Materials and Activities
- Participant Handout #27: Relationship Between the Strategy and Creative Brief
- Participant Handout #28: India Example: Creative Brief for Maternal Health Materials
- Participant Handout #29: Analyzing Examples of SBCC Materials
- Participant Handout #30: Creative Brief Worksheet
- Participant Handout #31: Seven Cs of Effective Communication
- Participant Handout #32: Reviewing Creative Considerations for Materials – A Final Check
- Participant Handout #33: Summary of Types of Testing for Materials
- Participant Handout #34: Checklist – Production of Quality Materials
- Slides #98–#145

SESSION 1

Getting Ready to Create

TOTAL TIME

60 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› explain the benefits of conducting a material inventory

HANDOUTS

› Participant Handout #26: Inventory of Existing Materials and Activities

INSTRUCTIONS

1. Congratulate the group for completing the last module, Focusing and Designing, and inform them that we will begin Module 3, which follows Step 3 of the C-Planning process, Creating. This session will provide an overview of considerations IEC officers should follow when developing or overseeing the development of media and materials.

2. Refer to a pre-populated flip chart page or **PowerPoint slide #100** to discuss some considerations for creating materials.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #100

Creating Effective Materials

Selecting a channel that reaches the intended audience is important.

- Creating effective materials is done after a communication strategy is complete.
  - The process requires testing all SBCC materials before finalizing and producing them.
- Creating SBCC materials combines science and art.
  - The science is creating materials based on the evidence and the situational analyses (as covered previously in this training).
  - The art is creating materials that evoke emotion, motivate the audience, and fit into the communication strategy.
- Remember, materials do not stand alone.
  - They support the communication strategy.
  - They support and are supported by other program activities.

3. **(5 minutes)** Ask participants

- Name any type of communication product (e.g., a poster, a training manual) that you have worked on in the past.
- Describe the process you used to create the material

Record on the Flip Chart

Communication Products Developed and Processes Used

FACILITATOR'S NOTE

Spend only a few minutes on this activity, since it is only to get the group to start thinking about different types of materials and the process used to create them. Listen for answers such as posters, flip charts, radio spots as well as conducting formative research, developing a strategy, budgeting the activity, and so on.

4. **(5 minutes)** Tell participants to break into their small group project teams.

- Instruct groups to select one type of communication material they would want to develop in keeping with their core problem and the small group work they have done up to this point.

- The material should come from or be consistent with the communication strategy they just completed in Module 2.
- Guide participants to consider selecting a simple communication material for this process since we are more interested in learning the foundations for creating the material and the process than the actual product output.

5. Explain to participants that before we dive into developing materials, we need to conduct an inventory of existing materials and activities so that we are not reinventing the wheel. Refer to a pre-populated flip chart page or **PowerPoint slides #101–#103** to provide more information on conducting materials inventories. (NOTE: You can keep participants in their small groups if they can see the presentation from where they are sitting.)

- Hand out **Participant Handout #26**: Inventory of Existing Materials and Activities to refer to when viewing the following slides.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #101-#103

Conducting a Materials Inventory

What is a materials inventory?

- a review of current and past materials developed
- compilation of materials and activities that might inspire your program
- materials you might consider adapting or complementing

Why do you need to conduct a materials inventory?

- to reduce inefficiencies caused by developing materials that already exist
- to learn from others in the field on what worked and what didn't

Remember, most communication-related issues have been addressed for many years.

How to Conduct a Materials Inventory (Refer to **Participant Handout #35**: Inventory of Existing Materials)

- Consider materials your program will need (from your communication strategy).
- Explore and track down materials you've heard about or that might be useful.
- After collecting the materials, ask yourself:
  - Which of these activities, tools, or materials are still in use and why?
  - What can you use or adapt for your purposes instead of reinventing the wheel?
  - What can be learned from others in the field?

Some Ideas on Where to Find Materials

- your own and other partners' organizations
- government agencies, NGOs, universities
  - The NACO, an online IEC resource directory available at www.nacoonline.org/NACORC/index.aspx.
  - NRP at www.poshan.nic.in
- global repositories for materials that have electronic files or other resources
  - C-Hub is a global repository of health and development communication resources. www.c-hubonline.org
  - The Communication Initiative has resources from around the world. You can search for India-specific resources at www.comminit.com

FACILITATOR'S NOTE

At the end of the slides, ask participants if they are familiar with any of the resources listed above and if they have any additions. Note them down and include them as resources in your discussion during future trainings.

6.  **(15 minutes)** Tell participants that we will conduct a materials inventory to guide the development of the communication material they selected in the last exercise.

- In their small groups, instruct participants to walk around and view the materials that have been set up in the room in the marketplace. These are communication materials that were brought in by their colleagues.

- Use **Participant Handout #26**: Inventory of Existing Materials and Activities (previously handed out) and instruct participants:
  - Determine what channel their material falls under and complete the inventory for that material. (They should not worry about the other channels for this activity.)
- As participants complete this exercise, they should think about:
  - What activities, tools, and materials are still in use and why?
  - What can they do to use or adapt the material for their purposes instead of creating new material or reinventing the wheel?
  - What can they learn from others in the field related to developing this type of material?

7. **(5 minutes)** Call time and after participants have regrouped, ask one group to present their worksheet

KEY SUMMARY POINTS FOR MODULE 3, SESSION 1 (POWERPOINT SLIDE #104)

- Materials inventories should be done prior to developing materials to determine possibilities for use and adaptation as well as to learn from what has already worked or has not worked.
- In addition to talking with similar programs, there are several Indian and international resources where managers can obtain examples of materials.

TOTAL TIME

90 minutes

SESSION 2

Using a Creative Brief to Develop Materials

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- list the various components of a creative brief
- develop a message brief component of a creative brief

HANDOUTS

- Participant Handout #27: Relationship Between the Strategy and Creative Brief
- Participant Handout #28: India Example: Creative Brief for Maternal Health Materials
- Participant Handout #29: Analyzing Examples of SBCC Materials
- Participant Handout #30: Creative Brief Worksheet

INSTRUCTIONS

1. Before introducing the creative brief to the group, explain that in times where there are no suitable materials that would fulfill their needs, the next step is to plan to adapt or create new materials.

2. Remind participants that the creative brief is related to their communication strategy. Ask participants to look at **Participant Handout #27:** Relationship between the Communication Strategy and the Creative Brief. Refer to a pre-populated flip chart page or **PowerPoint slide #106** to present this content

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #106

Relationship between the creative brief and your communication strategy

Overview of the Strategy (Step 2 in C-Planning)	
› Summary of the Analysis	› Problem statement › Changes the problem calls for
› Communication Strategy	› Final audience segmentation › Barriers (per audience) › Communication objectives (per audience) › Strategic Approach › Positioning › Key Content › Channels (per audience), activities, and materials
› Draft Implementation	› List of activities and materials, by communication objective, with resources and timeline
› Draft Evaluation Plan	› Plan, including draft of indicators, methods, and tools

Overview of the Creative Brief (Developed for *each material or activity* named in the strategy)
Goal and Audience(s)
Changes, Barriers, and Communication Objectives
Message Brief
Key Content and Tone
Media Mix and Other Creative Considerations

3. Tell participants that because this is a short training, we will not go into developing a full creative brief for their material, but we will work with creative briefs to get used to them and explore some of their components.

4. Hand out **Participant Handout #28**: India Example: Creative Brief for Maternal Health and refer to **Participant Handout #27**. Refer to a pre-populated flip chart page or **PowerPoint slides #107–#108** to present more information on creative briefs.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #107–#108

The Creative Brief

What is the creative brief?

- a short tool to guide the development of SBCC materials
- a guide for practitioners, creative agencies, and stakeholders to develop ideas for materials
- a document used to keep team members on track

Outline of a Creative Brief with Key Content (**Participant Handout #27**)

Goal and Audience	› Overall aim of the activity or material › Selected audience(s)
Communication Objectives	› Communication objectives addressing desired changes and barriers
Message Brief	› Key Promise › Support Statement › Call to action
Key Content and Tone	› Key content to communicate in this activity or material › Tone for this activity or material
Considerations	› Other creative considerations

5. For this training we will briefly practice using the creative brief. Refer participants to the ***Creating SBCC Campaigns Toolkit***, booklet C for more information on developing a creative brief and for examples.

6. **(5 minutes)** Ask the participants to spend 5 minutes reviewing **Participant Handout #28**: India Example: Creative Brief for Maternal Health Material.

7. **(5 minutes)** Call time and ask:

- What parts of the creative brief do you find particularly useful? Why?
- What parts are familiar to you if any at all?

8. **(20 minutes)** Tell participants that we are going to complete an exercise using a creative brief where we will "work backwards" toward an intended result.

- Select a communication material for participants to look at. (Suggest using a poster since it is simple and large enough for the group to see

FACILITATOR'S NOTE

A poster is suggested for this exercise as it is simple and large enough for everyone to see. A poster developed by IHBP or one volunteered by a participant who shared one for the marketplace would work well.

- Before the group starts the activity, set up the outline of the creative brief on a flipchart with some guiding questions that you will fill in during the activity.
- Hand out **Participant Handout #29**: Analyzing Examples of SBCC Materials for guidance on what to post on the flip chart or refer to **PowerPoint slide #109**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #109

Creative Brief Component	Guiding Questions for Group Discussion
Audience	› Who is the material intended for?
Changes, Barriers, and Communication Objectives	› Desired change: What change is the material asking for? › Barriers: Why is change not happening? Can you see the barriers that the material addresses? › Communication objectives: What is the aim of this material?
Message Brief	› Key promise/benefit: If the viewer does what, what will happen? What is the benefit? › Support statement: What convinces the audience they will experience the benefit? › Call to action: What is the material asking the person to do?
Key Content and Tone	› What is the tone? › What key information is in the material?
Media Mix/Other Considerations	› Are there any other creative considerations such as literacy levels, graphics, and language?

- Ask participants to gather around the material they will be working with and refer to the PowerPoint slide, **Participant Handout #29**: Analyzing Examples of SBCC Materials, or a pre-populated flip chart.
- Explain that you will quickly call out the sections of the creative brief they are viewing and the respondents should shout out the answers for you to write on the flip chart in the appropriate section of the creative brief.

Record on the Flip Chart

Creative Brief Component	Answers to Guiding Questions
Audience	
Changes, Barriers, and Communication Objectives	
Message Brief	
Key Content and Tone	
Considerations	

- Explain that this is a quick activity; we will be moving quickly through each section.

FACILITATOR'S NOTE

Don't spend too much time correcting a section. Even if the answer is incorrect, write down everything the groups say.

9. After the group has finished going through the exercise, thank everyone and have them return to their seats.

10. Once the group has resettled, explain that they have just completed a creative brief. Tell them now they will spend a little time reviewing and refining their responses.

11. **(15 minutes)** Review each component of the creative brief and the responses. Ask:

- Does everyone agree with the responses to this section?
- If not, what should be revised?

12. Remind participants that more information on how to develop a creative brief and examples are available in ***Creating SBCC Campaigns Toolkit***, booklet C. Hand out **Participant Handout #39**: Creative Brief Worksheet. Explain that this worksheet provides additional guidance on developing a

creative brief but today we will use it to focus on the message brief—the key promise, support statement, and a call to action.

13. Explain that we will work in small groups to develop a key promise, support statement, and a call to action based on a common scenario that will be presented. Refer to a pre-populated flip chart page or **PowerPoint Slides# 110–#112** and **#113** to provide more information on the message brief and present this scenario.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #110–#112

Message Brief

The message brief contains

- **The key promise**
  - Provides a compelling, truthful, and relevant benefit that the audience receives by taking the desired action
  - Example: "If you attend all your ANC appointments and deliver at a health facility you are more likely to have a healthy baby."
- **The support statement**
  - Convinces the audience they will actually experience the benefit
  - Details reasons why the key promise outweighs key barriers
  - Sometimes referred to as the aspirations of the audience: Who do they want to be?
  - This often becomes the message.
  - Example: "Because we all play a part in ensuring our baby's health."
- **The call to action**
  - Tells your audience what you want people to do or where to go to use the new product
  - Example: "Deliver in a health facility and stay 48 hours for a safe delivery and a healthy baby."

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #113

Creative Brief Example

Creative Brief for an SBCC Campaign to Garner Spousal Support and Participation for Birth Spacing

Creative Brief Component	Background
Audience	› **Primary**: unsterilized husbands of unsterilized women, ages 15–29. › **Secondary**: wives, mothers-in-law, peers, ASHAs, ANMs, block extension educators
Changes, Barriers, and Communication Objectives	› **Changes**: spacing of at least three years between births › **Barriers**: social and familial pressure for children, son preference, lack of communication addressing men's role in family planning › **Communication objective**: By the end of the campaign, there will be an increase in the number of married men who believe spacing of at least three years between births ensures better family health.
Message Brief	› **Call to action**: What is the material asking the person to do?

14.  **(20 minutes)** Have participants count off by four to form small groups. Using the example provided on the flip chart or PowerPoint slide, ask participants to use the message brief section of **Participant Handout #30**: Creative Brief Worksheet to guide them in developing a key promise, support statement, and call to action around spousal support of child spacing.

15.  **(5 minutes)** Reconvene and ask one or two groups to present their examples

KEY SUMMARY POINTS FOR MODULE 3, SESSION 2 (POWERPOINT SLIDE #114)

- Creative briefs are related to the communication strategy and are developed after the strategy is completed. They help IEC officers to guide the development of SBCC materials.
- Creative briefs contain sections on your communication goal and audience; changes, barriers, and communication objectives; a message brief; information on key content and tone; and media mix and other creative considerations.
- The message brief portion of a creative brief contains a key promise, a support statement, and a call to action

TOTAL TIME

45 minutes

SESSION 3

Effective Messages

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- list the Seven Cs of effective messages

HANDOUTS

- Participant Handout #31: Seven Cs of Effective Communication

INSTRUCTIONS

1. In plenary, explain to participants that the message brief section of the creative brief we just worked on gives birth to the messages that will stand out in the materials they develop. These messages may appear in a number of materials designed for a particular audience and objective.

2. Tell participants that from the message brief, key messages emerge. Refer to a pre-populated flip chart page or **PowerPoint slides #116–#118** to discuss key messages.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #116-#118

Key Message Considerations

Consider the following questions:

- What is the desired change?
- What are the barriers?
- What are the communication objectives?
- What do the key promise and support statement say?
- What are the important themes?
- What are the most important points or information to convey?

See ***Creating SBCC Campaigns Toolkit***, booklet C for additional information and guidance on developing key messages.

3. Tell participants that many times creative agencies will transform key messages into crafted messages. If they have a creative agency do this, their job as IEC officers should be to review final messages and ensure they follow the Seven Cs of effective messages, as outlined in the **Participant Handout #31**: Seven Cs of Effective Communication.

   - Hand out **Participant Handout #31**.
   - Refer to pre-populated flip chart page or **PowerPoint slides #119–#120** to present the Seven Cs of effective messages.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #119-#120

Seven Cs of Effective Messages

Consider the following questions:

1. Command attention
   - The message stands out to the audience.
   - The message is believable.
2. Clarify the message
   - The message is simple and direct.
   - The message focuses only on what the audience needs to know?
   - The strongest points are given at the beginning of the message.
3. Communicate a benefit
   - The message clearly states what the audience gets in return for taking action.
   - The message conveys that the benefit outweighs the barriers.
4. Consistency counts
   - Key messages are used appropriately and ensure consistency and support for all the programs materials.
5. Cater to the heart and the head
   - The message uses an appropriate tone for the audience and appeals to emotions as well as logic.
   - The appeal is appropriate as laid out in the creative brief.
6. Create trust
   - The information comes from a credible source.
7. Call to action
   - The call to action clearly states what the audience should do after seeing the communication.

4. **(15 minutes)** Pass around color printouts of one of IHBP's family planning campaign posters or refer to **PowerPoint slides #121–#122**.

a. Ask participants to view the poster on the slide (or being passed around).

b. Ask: Which elements of the Seven Cs, if any, are represented in these materials' messages?

Pass Around Color Handouts of the Posters Presented Below or Use PowerPoint Slides #121–#122

FACILITATOR'S NOTE

Try to avoid a situation where participants become overly critical of the examples provided. Use pointed questions to guide this discussion, for example:

- Does the poster command attention?
- Does the poster clarify the message?
- Does the poster communicate a benefit?
- Is the poster consistent with other campaign materials?
- Does the poster cater to the head and the heart?
- Does the poster create trust?
- Does the poster have a call to action?

5. Tell participants that from the message brief, key messages emerge. Refer to a pre-populated flip chart page or **PowerPoint slides #116–#118** to discuss key messages.

KEY SUMMARY POINTS FOR MODULE 3, SESSION 3 (POWERPOINT SLIDE #123)

- Messages are identified as a result of the message brief component of the communication strategy.
- Creative agencies and professionals can help IEC officers to refine and further develop final messages.
- There are Seven Cs of effective messages that can help guide IEC officers in developing and reviewing messages.

TOTAL TIME

45 minutes

SESSION 4

Drafting and Reviewing Materials

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- list several considerations for drafting and reviewing materials

HANDOUTS

- Participant Handout #32: Reviewing Creative Considerations for Materials – A Final Check

INSTRUCTIONS

1. Explain to the participants that now that we have completed the message brief, our programs need to develop the key content and tone sections of the creative brief. Refer to a pre-populated flip chart page or **PowerPoint slides #125–#126** to provide more information on this topic.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #125-#126

Key Content, Tone, and Media Mix

Key Content:

- provides the information and concepts that are essential
- describes what is relevant to the audience to achieve the communication objective to bring about change

Tone or Appeal

- conveys the key promise
- projects the feeling or personality your communication should have (e.g., humorous, logical, emotional, positive, or comic), based on the key promise

Media Mix/Activities

- describes how this material fits or relates to program activities and other materials

Openings, Creative Considerations, Cost, and Timing

Openings

- provides the information and concepts that are essential

Creative Considerations

- What language will the material be in?
- What are the reading levels of your audiences?
- What is the preferred style for photos or illustrations?
- What else in particular regarding style, layout, or visuals should be considered?
- What logos need to be used?

Cost and Timing

- How much will the activities or materials cost, and when do they need to be ready?

2. Tell the participants that the ***Creating SBCC Campaigns Toolkit***, booklet C and D have specific guidance, tips, and worksheets they can use for actually developing materials for an SBCC campaign once they are executing their creative brief. Ask them to follow along with you in the toolkit as you point out some of the relevant pages.

FACILITATOR'S NOTE

Open booklet D and point out the relevant material development content and tools.

3. Explain that we will not have time in this training to go through all of these materials development considerations but that the information is there for participants to review further independently and when they are developing materials.

4. Hand out **Participant Handout #32**: Reviewing Creative Considerations for Materials – A Final Check and explain that this is a good tool IEC officers can use to help them conduct a final review of material that has been developed before approving or using it.

- **(10 minutes)** Ask participants to review the handout.
- Instruct participants to choose one communication material that they brought to the training or to borrow one from the marketplace.
- Instruct participants to look at their material individually and review the applicable checklist items on the handout.

FACILITATOR'S NOTE

Not all items on the checklist will be applicable to each type of material or will be known to the participant.

5. **(5 minutes)** Call time and ask:

- Was this checklist helpful to you in reviewing a material?
- What were the key takeaways related to the material you reviewed?

FACILITATOR'S NOTE

Be careful that participants do not criticize other participants work. This exercise works best when participants respond generally or respond to a material they themselves brought to the training.

KEY SUMMARY POINTS FOR MODULE 3, SESSION 4 (POWERPOINT SLIDE #127)

- The creative brief includes considerations related to content, tone, and media mix.
- Several resources for developing and reviewing materials are available in the ***Creating SBCC Campaigns Toolkit***, booklets C and D, for IEC officers to use.

SESSION 5

Working with Creative Agencies

TOTAL TIME

45 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› describe key steps in engaging and working with a creative agency

INSTRUCTIONS

1. Explain to the participants that many times we need to hire creative agencies to develop our materials. Once we have a complete creative brief, we can engage a creative agency to develop the actual materials. As IEC officers, though, it is important to be involved and ensure quality at every step. Refer to a pre-populated flip chart page or **PowerPoint slides #129–#131** for more information on working with creative agencies.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #129–#131

Identifying Needs for a Creative Agency

The creative team can include

› artists › graphic designers › video producers › writers	› actors › musicians › other professionals

Advantages to hiring an external creative agency

› A creative agency can provide a new perspective on the creative brief, further refining or expanding concepts and offering suggestions not yet considered.

› An agency can be help in conceptualizing and designing a whole intervention with a set of mutually supportive activities and materials rather than stand-alone materials.

› It can support IEC officers to create and strengthen linkages between activities and materials, turning them into a recognizable campaign with logos and slogans.

Before deciding to contract a creative agency

› Does your organization have the in-house capacity to manage the tasks of the creative team?

› Does your division have creative or technical staff who can develop and produce the materials?

› Even if the budget is small, can your team provide the same quality?

2. Ask:

› **(5 minutes)** *Would anyone like to share an experience working with a creative agency?*

3. Refer to a pre-populated flip chart page or **PowerPoint slides #132–#135** to provide more information about working with creative agencies.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #132–#135

Hire and Work with a Creative Agency – Step 1

Step 1: Understand and Identify Potential Agencies

- Identify the need for creative services.
- Research and compile a list of qualified agencies or individuals and disseminate a request for proposals (RFP) for creative services.
- Estimate costs for materials you would like to develop and ensure sufficient budget.
- Meet with agencies to understand how they work, bill, and what services they provide and what is outsourced

For additional information on working with a creative agency, review the ***Creating SBCC Campaigns Toolkit***, booklet E.

Hire and Work with a Creative Agency - Step 2

Step 2: Select and Hire an Agency

- Develop and publicly advertise a detailed RFP. It should contain:
  - description of work to be developed
  - timeline and deliverables
  - request for creative submission
  - corporate capabilities and past work examples
  - selection/evaluation criteria
  - budget and budget notes
- Evaluate proposals. Form a group to review on technical merits and cost.
- Send questions and clarifications to potential agencies.
- Arrange for presentations from agency bidders
- Check references.
- Conduct final negotiations and ensure the creative agency agrees with final scope of work.
- Schedule a kick-off meeting.

For additional information on working with a creative agency, review the ***Creating SBCC Campaigns Toolkit***, booklet E.

Hire and Work with a Creative Agency - Step 3

Step 3: Manage your Contract with an Agency

- Designate a person or team to work with the agency to review drafts.
- Ensure the creative team understands the scope of work and expectations.
- Develop a review and approval system for creative work.
- Set up regular meetings for check-ins.
- Ensure the creative agency understands that you will provide the technical direction, review, and approval of all materials.
- Use checklists and tools to review the quality of materials being developed.

For additional information on working with a creative agency, review the ***Creating SBCC Campaigns Toolkit***, booklet E.

4. **(15 minutes)** Ask and record on the flip chart:

- *What effective mechanisms have you used in the past for managing a creative agency's work?*

  After writing down mechanisms, ask participants to prioritize the most important management strategies

Record on a Flip Chart

Creative Agency Management Mechanisms/Strategies

FACILITATOR'S NOTE

Listen for, post, and suggest responses such as:

- If communicating technical information, ensure that your team provides the core content.
- Provide a creative brief and important audience and technical background.
- Treat agency staff with respect.
- Share honest opinions.
- Participate in activities, such as production of TV and photography sessions.
- Establish one point of contact for your office and one for the agency.
- Consolidate team feedback into one response through your point of contact.
- Regularly review the timeline and budget with the agency account manager and your supervisor (consider a fixed price contract if appropriate).

5. Ask if there are any questions.

KEY SUMMARY POINTS FOR MODULE 3, SESSION 5 (POWERPOINT SLIDE #136)

- Creative agencies are often hired to develop materials informed by your creative brief.
- There are key steps IEC officers can follow when identifying, procuring, and managing a creative agency to ensure quality materials development.
- Several resources for working with creative agencies are available in the ***Creating SBCC Campaigns Toolkit***, booklet E.

TOTAL TIME

45 minutes

SESSION 6

Concept Testing and Pretesting

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› explain concept testing and pretesting

HANDOUTS

› Participant Handout # 33: Summary of Types of Testing for Materials

INSTRUCTIONS

1. Ask participants by show of hands:

› Who has experience in concept testing materials or managing this type of activity?

› Who has experience pretesting materials or managing this type of activity?

2. Explain that testing concepts and pretesting materials are essential components of developing quality material or media. Refer to a pre-populated flip chart page or **PowerPoint slides #138–#139** to provide more information on testing.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #138-#139

Testing your SBCC Materials to Ensure Effectiveness

Why Test?

- Testing confirms that materials are effective, appropriate, understandable, attractive, and culturally relevant.
- Testing gathers feedback from intended audiences, who may suggest alternative formats and identify confusing or unclear content.
- Testing identifies revisions that can then be made so the materials will be effective.
- Testing is easier and more cost effective to revise materials or activities during the material development stage than after they are finalized and disseminated

Types of Testing

- Concept testing
- Pretesting
- Stakeholder reviews (not covered in the training, but guidance is available in ***Creating SBCC Campaigns Toolkit***, booklet F)

3. In plenary, introduce concept testing and pretesting. Provide an overview of each focusing on: why test, definitions, types of testing, purpose, when to test, and with whom. Ask participants to look at **Participant Handout #33**: Summary of Types of Testing for Materials. Refer to a pre-populated flip chart page or **PowerPoint slide #140** to guide this discussion.

- Explain to participants that at *minimum*, materials developed should be pre-tested, but ideally, concept testing would also help to shape their development.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #140

Type Testing	Concept Test	Pretest
Purpose of Test	› Reaction to key messages › Reaction to proposed material formats › Information on what motivates and interests the audience	› Reaction to draft materials—visuals, text, colors, audio › Feedback on materials about comprehension, attractiveness, acceptance, involvement
When	› Before drafts are developed	› After concept testing and development of first drafts
With Whom	› Intended audience	› Intended audience › General public › Users
Materials Needed	› Drawings, black and white printouts, or mock-up designs › At least two draft formats or concepts to determine which one is preferred	› Drafts of materials
Methodology	› Focus group discussions, in-depth interviews, intercept testing	› Focus group discussions, in-depth interviews, intercept testing

4. 

Form four groups. Once the groups are formed, assign each group either concept testing, or pretesting (two groups for each assignment).

- **(15 minutes)** Tell the groups they will have 15 minutes to review their type of test in the ***Creating SBCC Campaigns Toolkit***, booklet F. They should be prepared to present briefly on the focus of the test, tips for conducting the test, and an example of one or two questions that might be used for each test.
- **(10 minutes)** Give each group 3 minutes to present back to the entire group.

5. 

Tell the participants that there is additional information on planning, conducting, and analyzing test results in the ***Creating SBCC Campaigns Toolkit***, booklet F.

KEY SUMMARY POINTS FOR MODULE 3, SESSION 6 (POWERPOINT SLIDE #141)

- Testing concepts and pretesting materials are essential components of creating materials.
- Testing helps to confirm that materials are appropriate, understandable, and effective. It also helps to gather input and feedback on the design and content from the intended audience.
- Concept testing aims to identify reactions to key messages, proposed formats, or audience motivations and interests.
- Pretesting aims to garner reactions to draft creative materials with a view to strengthening them.
- Several resources related to materials testing are available in the ***Creating SBCC Campaigns Toolkit***, booklet F, for IEC officers to use.

TOTAL TIME

30 minutes

SESSION 7

Finalizing Designs and Getting Ready for Production

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› describe considerations related to ensuring design and production quality

HANDOUTS

› Participant Handout #34: Checklist – Production of Quality Materials

INSTRUCTIONS

1. Remind participants of what they have already done up to this point. They have reviewed the relationship between the creative brief and communication strategy. They have reviewed and shared guidelines and tips for developing a message brief and key content for their materials, working with creative agencies to bring life to their materials, and planning tests for their materials.

2. Explain that the final step in creating materials is *finalizing designs and getting ready for production*. Refer to a pre-populated flip chart page or **PowerPoint slides #143–#144** to provide more information.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #143–#144

Finalizing Designs and Getting Ready for Production

Before making the final payment to the creative agency, ensure the materials are all finalized.

For each type of material, several things may be need to be checked.

8. For print materials:

- Make sure that all changes requested were made.
- Get the design files in electronic formats that are compatible with your system and print needs.
- Get print ready files for printing and PDFs for web and email dissemination.

9. For audiovisual materials ensure the radio/TV spots are fully produced and saved onto DVDs in the formats the stations need.

10. For mid-media, ensure the scripts, templates, and any other materials are finalized.

11. If materials are in multiple languages, make sure to get copies of each language version.

3.   **(10 minutes)** Explain that once the materials are finalized, it is time to consider production and duplication. Form project teams to review the **Participant Handout #34**: Checklist – Production of Quality Materials. Ask groups to review this checklist and to think of additional items to add for the blank sections.

4. **(10 minutes)** Call time and have each group present the additional guidelines they would like to add to the checklist.

5. Ask if there are any questions.

6.  Remind participants that the ***Creating SBCC Campaigns Toolkit*** has much more specific guidance, examples, templates, and tips they can use while they are creating or managing the creation of SBCC campaigns.

KEY SUMMARY POINTS FOR MODULE 3, SESSION 7 (POWERPOINT SLIDE #145)

- The final step in creating materials is finalizing designs and getting ready for production.
- There are several key things IEC officers can check for to ensure quality in their materials prior to production.
- Several resources for production are available in the ***Creating SBCC Campaigns Toolkit***, booklet G.

MODULE 4

Implementing and Monitoring

TOTAL TIME

3.75 hours
(not including breaks)

LEARNING OBJECTIVES

By the end of this module, participants will be able to (**PowerPoint Slide #146**)

- name key components of a work plan
- define activities from a communication strategy
- define SBCC campaign budget inputs
- name key considerations for media placement
- describe benefits of monitoring
- define sample monitoring questions

OVERVIEW

Session	Title	Duration
1	Overview of Implementation Plans	15 minutes
2	Planning Activities	45 minutes
3	Budgeting for SBCC Campaigns	45 minutes
4	Considerations for Implementation of SBCC Programs	60 minutes
5	Monitoring SBCC Campaigns	60 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation and pretests
- LCD projector (if available)

Advance Preparation

- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts and PowerPoint slides

Handouts

- Participant Handout #35: Sample Excerpt of Implementation Plan
- Participant Handout #36: Integrating the Campaign into the Implementation Plan Worksheet
- Participant Handout #37: Budgeting
- Participant Handout #38: Placement of Materials
- Participant Handout #39: What Will you Monitor
- Slides #146–#178

SESSION 1

Overview of Implementation Plans

TOTAL TIME

15 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- name key components of a work plan

HANDOUTS

- Participant Handout #35: Sample Excerpt of Implementation Plan

INSTRUCTIONS

1. Congratulate participants for completing Module 3 on Creating.
2. Explain to participants that we will now focus on Step 4 of the C-Planning process, Implementing and Monitoring, which is key to IEC officers. Tell them that you'll be spending much of Step 4 on implementing work plans and with some activities related to monitoring
3. Refer to a pre-populated flip chart page or **PowerPoint slide #148**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #148

- During the fourth step of C-Planning, communication plans turn into action!
- Clarity and confidence in plans are key elements in effective SBCC implementation.
- IEC teams need to ensure they have
  - clarity of vision
  - confidence that their plans will make a significant difference
  - capacity for rigorous attention to detail, timely delivery of products, cost-effectiveness, and quality production

4. Explain to the participants that since they are well-versed in developing work plans, we will only briefly review an example work plan and spend most of the session on considerations for each component. Refer to a pre-populated flip chart page or **PowerPoint slides #149–#151**.

- Handout **Participant Handout #35**: Sample Excerpt of Implementation Plan to refer to while viewing the slide.
- Explain that work plans or implementation plans enable us to map out what will happen, who will complete the work, what resources are allocated for the activities, and when activities will be completed.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #149–#151

Sample Excerpt of Implementation Plan

List of Activities	Implementers	Resources	Timeline
Communication Objectives: By the end of the program, there will be: › an increase in the number of couples who know about modern contraceptive methods (MCM) and their benefits › a decrease in fear and misconceptions about MCM use among couples			
Activity 1: Develop, launch, and sustain integrated SBCC mass and print media campaign			
Develop draft communication materials	MOHFW, creative firm	Creative firm contract	Q1
Pretest campaign materials	MOHFW	Research contracts	Q2
Produce final campaign materials	MOHFW; creative firm, printer	Creative firm, print contracts	Q2
Implement and monitor campaign	MOHFW; partners	Travel	Q3-4
Activity 2: FP/MCM frontline health worker communication			
Develop training	MOHFW	Consultant	Q1
Training of trainers for ASHAs	MOHFW;NIHFW	Training Costs	Q2
Conduct and monitor ASHA counseling sessions	MOHFW	Travel, facilitator costs	Q3-4
Activity 3: Mid-media activities			
Develop scripts for mid-media	MOHFW	in house	Q2
Pretest scripts for mid-media	MOHFW	in house	Q2
Train theater groups	IHBP, theater partner	Training Costs	Q2
Conduct and monitor community sessions	IHBP, theater partner	Travel, theater contracts	Q3-4

FACILITATOR'S NOTE

Review this work plan briefly, pointing out the communication objectives and how the materials and activities are represented in the implementation plan. Explain again that each program has its own format and organization, but all with the same components.

5. Ask:

- *Is there anything missing from this work plan?*
- *Do you have any questions about what is included in a work plan?*

KEY SUMMARY POINTS FOR MODULE 4, SESSION 1 (POWERPOINT SLIDE #152)

- Work plans help IEC officers map out what will happen, who will complete the work, what resources are allocated, and when SBCC activities will be completed.
- Key work plan components include: communication objectives, list of activities, implementers, resources needed, and timeline.

TOTAL TIME

45 minutes

SESSION 2

Planning Activities

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› define activities from a communication strategy

HANDOUTS

› Participant Handout #36: Integrating the Campaign into the Implementation Plan Worksheet.

INSTRUCTIONS

1. Explain that one of the first steps of a work plan is to map out the activities the program will do. For communication campaigns it is important to think about how the communication campaign fits into the overall program and what activities need to be implemented to complement the campaign.

2. It is also important from an early stage to begin thinking about how activities and related materials will be distributed, used, and monitored.

3. **(5 minutes)** Ask:

   › *How should program/campaign implementation plans be reflected in annual PIP planning cycles?*

4. Refer to a pre-populated flip chart page or **PowerPoint slide #154.**

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #154

When developing work plans, it is important to

› map out activities needed

› integrate the communication campaign into the overall program

Consider

› What are the program's activities?

5. **(10 minutes)** Ask the group and post on the flip chart:

- *What types of activities should we consider when using mass/social media strategies?*
- *What types of activities should we consider when using mid-media strategies?*
- *What types of activities should we consider for interpersonal strategies?*

Record on Flip Chart

Mass Media/Social Media-related Activities
Mid-Media-related Activities

FACILITATOR'S NOTE

For all communication channels, look for activities that focus on design, implementation, monitoring, and evaluation. For interpersonal and mid-media, look also for training activities. Once training is mentioned, ask the group to look at the ***Creating SBCC Campaigns Toolkit: Implement your Campaign*** *section for content on training and its importance to quality interpersonal and mid-media activities.*

6. Ask participants to look at the ***Creating SBCC Campaigns Toolkit***, booklet G and refer to a pre-populated flip chart page or **PowerPoint slides #155–#156** to talk further about implementation.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #155–#156

After thinking of the activities needed, consider the following elements.

Sequencing

- In what order do the activities need to happen?
- What components of our communication campaign will support this activity?

Timing

- When do things have to be completed or implemented?
- Are there any unrelated events that will interfere, such as holidays?
- Are there any events in the community that will support the activity or hinder it?

Synergy

- What activities or materials need to be completed before the activity can be implemented?
- Is there an organization we can work with that will complement our activities?

7. **(20 minutes)** Ask participants to break into their small project teams.
   - Instruct participants to think about their problem and communication strategy they worked on earlier during this training.
   - Handout **Participant Handout #36**: Integrating the Campaign into the Implementation Plan Worksheet.
   - Using this toolkit section, they should complete the handout within their small groups.
8. **(5 minutes)** Call time and after participants have regrouped, ask one group to present its worksheet.

KEY SUMMARY POINTS FOR MODULE 4, SESSION 2 (POWERPOINT SLIDE #157)

- When developing activities, IEC officers need to pay attention to activity sequencing, timing, and synergy.

SESSION 3

Budgeting for SBCC Campaigns

TOTAL TIME

45 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

› define SBCC campaign budget inputs

HANDOUTS

› Participant Handout #37: Budgeting

INSTRUCTIONS

1. In plenary, hand out and review the **Participant Handout #37**: SBCC Budgeting tool that has tips to make sure implementation stays within budget.

2. Remind participants that budget and resources are important parts of implementing an SBCC campaign. Programs need to make sure they can plan enough resources for effective implementation. Refer to a pre-populated flip chart page or **PowerPoint slide #159**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #155–#156

Budgeting Considerations

List of Activities	Events (IPC and Mid-Media)	Training
› Creative Agency › Pretesting › Airtime › Printing › Distribution › Other: _____ › Other: _____	› Fees for performers, facilitators › Giveaways (e.g., stickers and t-shirts) › Press and kick-off events › Honoraria › Rental of sites, public address systems, other equipment › Transportation to site and back › Other: _____ › Other: _____	› Consultant and trainer fees › Per diem, transport, and accommodation for participants › Reproduction of training materials › Rental of training site, equipment purchase or rental › Other: _____ › Other: _____
Monitoring and Evaluation		**Other**
› Development, distribution, and collection of M&E data › Orientation of trainers and training of field workers › Travel allowance for supervision and/or quality assurance of data collection › Compilation and analysis of data › Organization of feedback session(s) › Fees or salaries for researchers › Other: _____ › Other: _____		› Communication (e.g., telephone, Internet, fax, postage) › Administrative and overhead costs › Other transportation costs › Other: _____ › Other: _____

3. **(3 minutes)** Ask:

   - *Are there any other budget categories participants would like to add?*

4. **(15 minutes)** Tell participants they will now form four groups to develop cost estimates for each of the categories. After four groups are formed, assign each group a category. Do not assign groups the "other" category. Tell participants that they should:

   - review the **Participant Handout #37**: Budgeting and start making cost estimates based on their experience in terms of rolling out campaigns within their states and based on ensuring an adequate mix of communication channels (including interpersonal and mid-media as included in this training)
   - leave an item blank if they are unsure, since the rest of the group will help them

5. **(10 minutes)** Call time and ask groups to pair off and present to another group. They should discuss with their partner group:

   - whether they agree with what the partner group has presented
   - how they can help the group fill in any missing costs

FACILITATOR'S NOTE

The purpose of this exercise is for participants to get an idea of items they will need to budget. They should focus on budget allocation for interpersonal communication and mid-media in addition to mass media. Encourage participants to agree on ranges of cost, instead of exact amounts.

6. Conclude this session by covering a few myths and misconceptions about the costs of SBCC campaigns. Refer to a pre-populated flip chart page or **PowerPoint slides #160–#162**.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #160–#162

Myths and Misconceptions about SBCC Costs

Myth: It's cheaper to choose one communication channel over another.

Fact: Different communication channels interact with each other, and this interaction can form a complex network of communication effects and synergies. For example, when measured alone, a mass media intervention may have little effect, but the same intervention may have significantly greater outcomes when complemented by interpersonal and mid-media communication.

Myth: SBCC is expensive.

Fact: A big budget is not essential for a successful SBCC campaign. Programs can make the most of whatever money is allocated by properly planning and partnering with other organizations and the private sector.

Myth: Social media are cheap and replace more traditional media.

Fact: Social media can complement other media in an effective mix. They are not cheap if they do not reach the target audience. Targeting a specific audience with a defined message is often more effective—and cheaper—than raising awareness on a grand scale through one-way messaging. Consider whether your audience uses social media or has access to it all the time (e.g., when asked, wives may say they have access to the family phone but in reality, it is primarily used by the husband).

FACILITATOR'S NOTE

Time permitting, turn the presentation of myths and misconceptions into a fun, participatory exercise, such as a group or small team debate.

KEY SUMMARY POINTS FOR MODULE 4, SESSION 3 (POWERPOINT SLIDE #163)

- Budgeting and planning for appropriate campaign resources ahead of time is a key consideration for IEC officers.
- Budgeting considerations for SBCC campaigns include materials, events, training, M&E, as well as other costs such as communication and administration.
- Choosing one communication channel over a strategic mix in the interest of time or expense diminishes the impact of your intervention.
- SBCC does not have to be expensive.
- Social media are often not a good replacement for mass or other media even though they appear less expensive.

SESSION 4

Considerations for Implementation of SBCC Programs

TOTAL TIME

60 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- name key considerations for media placement

HANDOUTS

- Participant Handout #38: Placement of Materials

INSTRUCTIONS

1. Tell participants that in addition to budgeting, there are some logistical considerations for implementing quality SBCC programs.
   - These include higher level considerations—e.g., how IEC officers will ensure that their activities and materials will be adopted and appropriately used by implementers and stakeholders,
   - These also include considerations as to the specifics for where campaign materials may be used or displayed.
2. **(10 minutes)** Ask participants
   - *What strategies could you use to ensure coordination, buy-in, proper distribution, and uptake of activities and materials that you have designed or are responsible for rolling out?*

FACILITATOR'S NOTE

Listen for and post on the flip chart answers such as

- Bring district and block-level stakeholders and officials together to share materials, explain materials' development and use, and stakeholders' role in achieving the material/program's objectives.
- Travel to districts to ensure materials are properly distributed and used.
- Establish clear roles and responsibilities between state, district, and block-level officials related to printing, distribution, and monitoring.

3. Explain that now we are going to discuss optimal placement of campaign materials. Refer to a pre-populated flip chart page or **PowerPoint slides #165–#167** to guide this discussion.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #165–#167

Where will the Materials be Used?

For mass media programs

- Choose stations or carriers that your intended audience listens to or uses.
- Review stations for audience size (reach), audience profile.
- Air spots during times your audience is listening or viewing.
- Air and disseminate spots/programs for at least 3–4 months.
- Air spots at least twice a day per spot on each station.

Where will the Materials be Used?

For print materials

- Place materials where your audience can view or access them.
- Choose a space where they stand out and will gain attention.
- Choose an appropriate size for the space.
- Place in a space where they will not be damaged or can easily be replaced (consider putting a gloss or laminate over them when printing so they last longer).
- Select an appropriate space where audience can view the entire material.
- If content-heavy materials are about sensitive topics (e.g., sexuality), ensure they are in places where they can be viewed privately.

Where will the Materials be Used or Media Executed?

For mid-media and IPC

- Choose an appropriate location and time of day based on the target audience (if you do not want a lot of children present because they are not the target audience, think about a time when they will be most occupied (e.g., school hours).
- Ensure there is enough space for backdrops and props.
- Find a location that is not too noisy and the audience can hear and see.
- Set clear objectives for the event since this will affect the size of the desired group.
- Determine what you want your audience to do since this will influence how many times you should repeat or reach your audience.

4.  **(5 minutes)** Hand out **Participant Handout #38**: Placement of Materials for participants to review briefly and refer participants to the ***Creating SBCC Campaigns Toolkit***, booklet G for further information after the training. Explain that there is more detail in both of these resources on placing materials.

5.  **(5 minutes)** Ask if there are any tips or guidelines they would like to add. Is anything missing? Post responses on a flip chart.

Record on Flip Chart

Additional Tips for Material Placement

6. Refer to a pre-populated flip chart page or **PowerPoint slides #167–#168** to provide additional guidance on strengthening quality SBCC program implementation.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #167–#168

Five Tips to Strengthen the Implementation of SBCC Programs

- Involve audience members and encourage them to participate at every step.
- Learn from others currently doing the work.
- Encourage staff to take initiative and be resourceful.
- Demonstrate a commitment to excellence—in design, production processes, services, and monitoring, and not just in products.
- Consistently seek affordable, quality solutions. These may not be the cheapest option, but quality pays in the end.

Four Tips to Improve Work Systems

To build quality into SBCC program implementation, you can do the following:

- Critically review the tasks at hand and how the team tries to accomplish them.
- Assess how tasks and work systems fit together.
- Clarify responsibilities and strengthen links across teams.
- Focus on increasing capacity, not only on increasing results.

7. **(10 minutes)** Ask participants to consider communication programs they've worked on in the past. Have participants describe strategies they have seen in action to ensure quality in their programs and campaign roll-outs.

- *What was effective in the leadership?*
- *What was effective in the teamwork?*
- *How was the planning effective?*

KEY SUMMARY POINTS FOR MODULE 4, SESSION 4 (POWERPOINT SLIDE #170)

- It is important to consider where materials will be used and where media will be aired as part of quality implementation.
- There are strategies and tips for strengthening SBCC program implementation available in the ***Creating SBCC Campaigns Toolkit***.

TOTAL TIME

60 minutes

SESSION 5

Monitoring SBCC Campaigns

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- describe benefits of monitoring
- define sample monitoring questions

HANDOUTS

- Participant Handout #39: What will you Monitor?

INSTRUCTIONS

1. Tell participants that we will briefly touch upon monitoring here and will share some tools that can be used and come up with some indicators for monitoring our programs.

2. **(10 minutes)** Ask participants if any of them have experienced challenges or successes monitoring SBCC campaigns they would like to share:

FACILITATOR'S NOTE

Do not let the discussion go off topic or leave the impression that the list of challenges is longer than the list of successes. Try to elicit both types of examples. If only challenges are raised, ask the group what strategies could be used to overcome them. Ensure that this discussion keeps to less than 10 minutes unless additional training time is available.

3. Refer to a pre-populated flip chart page or **PowerPoint slides #172–#177.**

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #172–#177

Before diving into monitoring, programs need to

- decide what will be monitored – for example
  - program reach
  - program quality
  - program impact
- develop monitoring indicators and targets
  - How will you measure the quality and effect of the materials? For example
    - quality communication check lists for IPC and mid-media programs
    - qualitative research (e.g. focus groups) with program beneficiaries and stakeholders
    - impact studies
  - What are the programs' goals in use and quality? For example
    - number of program participants
    - number of materials distributed
    - percent of participants exposed to campaign messages across more than one communication channel
- decide on monitoring methods and tools
  - What methods will you use? For example
    - sampling mid-media performances to ensure they are aired according to schedule
    - mystery client visits
    - qualitative methods to elicit feedback

Concrete benefits of monitoring include:

- ensures that materials and media are distributed as planned
  - (e.g., after they are sent to the district government office, they are further distributed as directed in the community)
- ensures that materials are being used appropriately
  - (e.g., job aids are used and carried during ASHA counseling sessions and not left at home)
- ensures that interpersonal communication (IPC) and mid-media activities are implemented in a quality way
  - (e.g., regular field supervision is occurring, checklists are used)
- changes the sites where the graphic material is displayed for greater effectiveness
  - (e.g., posters placed in a space where your audience will see it)
- broadcasts in other media and/or at more appropriate times
  - (e.g., if your audience listens to the radio at 11:00, air at 11:00)
- delays the broadcast launch if a product has not been produced, has not been delivered, or is not available in all the promised sites
- reshapes training sessions
  - (e.g., if they are not delivering on their intended objectives)
- changes product prices
  - (e.g., if they are unaffordable to your audience)
- improves distribution systems
- changes elements of message strategy
- Makes midcourse corrections of the implementation
- Shifts internal workloads or responsibilities

4.   **(20 minutes)** Tell participants to form small project teams.
   - Hand out **Participant Handout 39**: What Will you Monitor?
   - In the groups they should review the handout and consider what their monitoring questions they have for the SBCC campaign they have been working on.
   - Tell participants there are sample questions already in the handout, but they should come up with some additional questions.
5. **(5 minutes)** Call time and ask one group to share its worksheet.

6. Tell participants that we will continue to think about indicators as we go into C-Planning Step 5: Evaluating and Replanning.

7. Show participants the various monitoring tools and templates available to them in the ***Creating SBCC Campaigns Toolkit***, booklet I. Briefly run through and point them out.

FACILITATOR'S NOTE

Tell participants that this training only briefly covered monitoring. However, the ***Creating SBCC Campaign Toolkit: Monitor your Campaign*** has guidance and tools participants can use if they want more information, including material distribution templates.

KEY SUMMARY POINTS FOR MODULE 4, SESSION 5 (POWERPOINT SLIDE #178)

- There are many benefits to monitoring your SBCC program. These include ensuring implementation occurs as planned and ensuring quality.
- Monitoring needs guide the development of monitoring questions.
- SBCC program monitoring tools and templates are available in the ***Creating SBCC Campaigns Toolkit***, booklet I for managers to use.

MODULE 5

Evaluating and Replanning

TOTAL TIME

1 hour

LEARNING OBJECTIVES

By the end of this module, participants will be able to (**PowerPoint Slide #179**)

- define the difference between monitoring and evaluation
- name several key considerations before data collection
- understand how M&E questions help define appropriate indicators
- understand how communication objectives help define a program's desired outcomes to be evaluated
- provide an example of how monitoring and evaluation data can be used for replanning

OVERVIEW

Session	Title	Duration
1	M&E for SBCC	60 minutes

Materials Needed

- flip chart paper and markers (some pages blank, some pre-populated)
- participant handouts, including hard copies of PowerPoint presentation and pretests
- LCD projector (if available)

Advance Preparation

- Write the boxed text on the flip charts and/or utilize the PowerPoint presentation slides that correspond with this text.
- Make copies of the participant handouts and PowerPoint slides.

Handouts

- Slides #179–#189

SESSION 1

M&E for SBCC

TOTAL TIME

60 minutes

LEARNING OBJECTIVES

By the end of this session, participants will be able to

- define the difference between monitoring and evaluation
- name several key considerations before data collection
- understand how M&E questions help define appropriate indicators
- understand how communication objectives help define a program's desired outcomes to be evaluated
- provide an example of how monitoring and evaluation data can be used for replanning

INSTRUCTIONS

1. Congratulate participants for completing Module 4 on Implementation and Monitoring.

2. Explain that in Module 5 we are going to briefly discuss M&E and replanning, which correspond with C-Planning process Step 5.

3. **(10 minutes)** Ask participants

   - *What has your role been in relation to monitoring and evaluation (M&E) of your programs, if any?*
   - *How can quality M&E make a difference in the SBCC programs you manage?*

4. Refer to a pre-populated flip chart page or **PowerPoint slides #181–#182** to provide more information on M&E.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #181–#182

Differentiating Monitoring and Evaluation

- **Monitoring** tracks and measures a program's activities:
  - what it is doing, where, with whom, how much, and when
  - what a program's progress is toward achieving its communication objectives
  - looks at both process (scope of activities) and outputs (results of activities)
  - asks how well activities are implemented and to what extent planned activities are realized
- **Evaluation** is data collection at discrete points in time to investigate a program's effectiveness in bringing about the desired change. It:
  - compares variables and measures them over time
  - asks
    - Were barriers reduced?
    - Were changes meaningful?
    - Have communication objectives been achieved?
  - looks at both outcome (short term results) and impact (long term effects)

5. Explain that there are several key decisions IEC officers and M&E specialists need to make before beginning to collect data and that the bulk of M&E work happens before data collection. Refer to a pre-populated flip chart page or **PowerPoint slide #183**, which details these considerations.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slide #183

Considerations before Data Collection (Baseline, Midline, and Endline)

- Who will use the data and how?
- What is the final set of SMART communication objectives (specific, measurable, attainable, realistic, and time-bound) for the campaign/program?
- What M&E questions are linked to activities in the work plan and each SMART objective?
- What are the indicators and targets that will tell how close the program is to the desired path and how things are changing?
- If evaluating, what type of design will be used?
- What evaluation research methods best suit the indicators?
- What tools should be used to collect the data?
- How will data quality be ensured?
- Who will analyze the findings and how?

6. Explain that many of these considerations need to be made in conjunction with M&E colleagues or a research firm may need to be procured. Together, IEC officers and M&E colleagues will need to develop M&E indicators and targets for their programs.

7. Refer to a pre-populated flip chart page or **PowerPoint slides #184–#186** to provide more information on developing M&E indicators and targets.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #184–#186

M&E Indicators and Targets

- **Indicators**
  - are data points that are used to measure how close a program is to its desired path and how much things are changing
    - e.g., number of communities reached by mid-media activities
  - are defined by the program/campaign's objectives
- **Targets**
  - provide clarity about what will be achieved by the project and are set at the beginning of the program
    - e.g., 60% of program communities
- M&E questions can help develop appropriate indicators.
- Communication objectives can help point to the program's desired outcomes to be evaluated.

Example

Workplan Activity	Monitoring Question	Monitoring Indicator
Air radio spots in 3 communities	was the radio spot aired? in how many communities was the radio spot aired	Process indicator: Radio spot aired Output indicator: number of communities reached by radio spot broadcast
Communication Objective	**Evaluation Question**	**Evaluation Indicator**
By the end of project there will be an X% increase in the number of women who are aware of the benefits of family planning	Did women become more aware of the benefits of family planning?	% of women aware of the benefits of family planning at baseline % of women aware of the benefits of family planning at endline

8. Ask participants if they have any questions.

9. **(10 minutes)** Ask participants:

   - *What types of monitoring tools do you use or could you use for a campaign that used mass media, mid-media, and interpersonal communication channels?*

FACILITATOR'S NOTE

Differentiate between quantitative and qualitative methods and listen for and post on a flip chart answers such as:

- Quantitative methods:
  - radio or TV transmission reports or program logs
  - attendance sheets, sign-in forms
  - routine activity tally forms
- Qualitative methods:
  - observation notebooks
  - journals that record entries by frontline workers

10. **(5 minutes)** Ask participants:

    - *What types of **evaluation tools** do you use or could you use for a campaign that used mass media, mid-media, and interpersonal communication channels?*

FACILITATOR'S NOTE

Differentiate between quantitative and qualitative methods and listen for and post on a flip chart answers such as:

- Quantitative methods:
  - reach and recall surveys
  - knowledge, attitude, and practices surveys
  - provider/client interviews
- Qualitative methods:
  - focus group discussions or in-depth interviews
  - observation tools

11. Explain to participants that one of the primary reasons we monitor and evaluate our programs and campaigns is to see if results can be used to improve our programs. Once data are analyzed, they should be shared with those who can use them.

12.  Refer to a pre-populated flip chart page or **PowerPoint slides #187–#188** to provide more information on developing M&E indicators and targets.

Turn to Pre-Populated Flip Chart Pages with the Content Below or PowerPoint Slides #187–#188

Using Data for Replanning

Monitoring data can tell IEC officers how well they implemented their program and provide reasons for why it may have gone off course. Findings can be used to

- modify approaches to serving the intended audience
- increase access to program activities and services
- improve program delivery and reallocation of resources

Evaluation data can tell IEC officers if their program was effective and how well it addressed barriers and achieved communication objectives. Findings can be used to

- revisit targeted barriers if there is no change seen, since the wrong ones may have been addressed
- adjust the communication strategy if results were achieved but not maintained
- re-review how well materials appeal to different audience segments if only one group is changing

13.  **(15 minutes)** Have participants count off and break into small groups. Within small groups, ask participants to discuss the following:

- *How has their view shifted (if at all) with regard to the value of M&E for their SBCC programs/campaigns?*
- *What challenges do they foresee in ensuring appropriate M&E of their activities?*
- *For each challenge, what insights have they gained during this training or that they can provide for how they could overcome that challenge?*

14. Reconvene the group and ask one or two groups to share highlights from their discussion.

15.  **(5 minutes)** Explain that many people consider M&E the job of M&E specialists, but that is not always so. Go around the room quickly and ask participants:

- *What is one aspect of M&E with which you should be involved given your role as an IEC officer?*

KEY SUMMARY POINTS FOR MODULE 5, SESSION 1 (POWERPOINT SLIDE #189)

- Monitoring tracks and measures a program's activities while evaluation investigates its effectiveness in bringing about change.
- There are several key considerations for IEC officers before data collection can occur.
- M&E questions help to develop indicators.
- Communication objectives help define desired outcomes to be evaluated.
- A key purpose of M&E data is to use it to improve programs and approaches.
- IEC officers can play important roles in the M&E of their programs.

TRAINING CLOSE

Training Close

TOTAL TIME

45 minutes

Materials Needed

- flip chart paper and markers
- training post-test
- evaluation

Advance Preparation

- Prepare closing remarks.
- Fill in and sign training certificates for each participant.

Handouts

- Post-test (Annex A)
- Evaluation (Annex B)
- Participant training certificate (Annex C)

TOTAL TIME

60 minutes

Concluding Session

INSTRUCTIONS

1. Congratulate participants for completing all five training modules and thank them for their participation in the training.

2. **(20 minutes)** Ask participants and record responses on the flip chart:

   › *Now that you have completed this training, how will you apply the principles of SBCC imparted in this training within your own work?*

Record on the Flip Chart

How to Apply Training SBCC Principles to IEC Officers' Work

FACILITATOR'S NOTE

Listen for and post on a flip chart answers such as:

- will share content/information learned with others
- will use the ***Creating SBCC Campaigns Toolkit*** when developing materials
- will employ an effective channel mix when rolling out campaigns that includes mid-media and interpersonal communication in addition to mass media
- will follow the C-Planning process
- will use the socio-ecological model to conduct situation analyses
- will develop a communication strategy to guide campaign development
- will develop creative briefs prior to developing materials
- will follow the 10 Principles of SBCC
- will plan and take steps to ensure quality implementation of programs
- will take a greater role in the M&E of SBCC activities

- *What new programs will you launch in the next 1–2 years to which you could apply a systematic SBCC process?*
- *As you begin to apply SBCC principles learned in this training, would you consider calling upon the expertise in this room for additional help or brainstorming?*

FACILITATOR'S NOTE

If participants respond affirmatively, facilitate an exchange of contact information to create a training group community of practice/resource network.

3. **(15–20 minutes)** Hand out the training post-test and evaluation and give participants 15–20 minutes to complete it. Make sure you collect all forms prior to closing the workshop.

4. Conclude the training by inviting a speaker to offer closing remarks or deliver closing remarks you have developed.

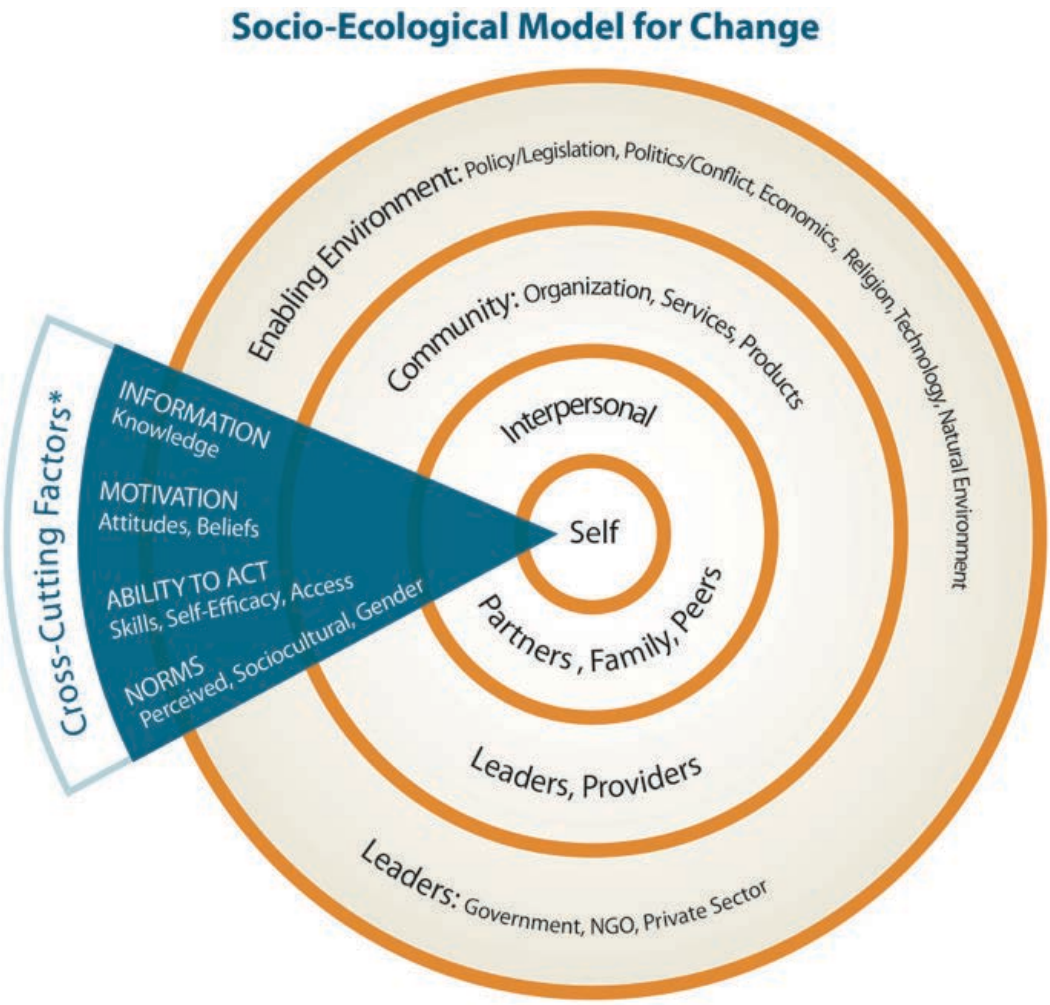
5. Hand out participant training certificates (Annex C).

Participant Handouts

#1: C-Planning Process

SOURCE: Adapted from Health Communication Partnership, P-Process Brochure, CCP at JHU (2003); McKee, Manoncourt, Chin, Carnegie, ACADA Model (2000); Parker, Dalrymple, and Durden, The Integrated Strategy Wheel (1998); AED, Tool Box for Building Health Communication Capacity (1995); National Cancer Institute: Health Communication Program Cycle (1989).

#2: Socio-Ecological Model



*These concepts apply to all levels (people, organizations, and institutions). They were originally developed for the individual level.

SOURCE: Adapted from McKee, Manoncourt, Chin and Carnegie (2000)

#3: Three Key Strategies of SBCC

SOURCE: Adapted from McKee, N. Social Mobilization and Social Marketing in Developing Communities (1992)

#4: How SBCC's Key Strategies Contribute to Programs

Directions: Use this worksheet to reflect on the key strategies and how they can contribute to an SBCC program.

Advocacy: To raise resources as well as *political and social leadership commitment* to development actions and goals

1. Describe a MOHFW or other project/initiative you've seen or worked on that included advocacy.

2. What do you think is the value of using advocacy strategies?

Social mobilization: For wider participation, *coalition building*, and *ownership*, including *community mobilization*

1. Describe a MOHFW or other project/initiative you've seen or worked on that included social mobilization.

2. What do you think is the value of using social mobilization strategies?

Behavior change communication (BCC): For changes in *knowledge, attitudes, and practices* among specific audiences

1. Describe a MOHFW or other project/initiative you've seen or worked on that included BCC.

2. What do you think is the value of using BCC strategies?

#5: Ten SBCC Principles

Principle #1: Follow a systematic approach.

Principle #2: Use research, not assumptions, to drive your program.

Principle #3: Consider the social context.

Principle #4: Keep the focus on your audience(s).

Principle #5: Use theories and models to guide decisions.

Principle #6: Involve partners and communities throughout.

Principle #7: Set realistic objectives and consider cost effectiveness.

Principle #8: Use mutually reinforcing materials and activities at many levels.

Principle #9: Choose strategies that are motivational and action-oriented.

Principle #10: Ensure quality at every step.

#6: Prachar Case Study[1]

The Prachar project in India was implemented in three phases. The project worked to improve adolescent and young married couples' reproductive health. Through a situation analysis, the project set objectives to

- delay the birth of the first and second child
- improve the health and welfare of young mothers and their children
- improve the economic well-being of families
- reduce population growth by changing social norms related to early child-bearing

The primary target group for the project were young adolescents (ages 15–24 years) as well as couples in which the wife was younger than 25 and had no more than one child. Within this universe, the target group was treated not as a homogenous group, but rather as subgroups with differing, life stage-specific needs, including:

- unmarried adolescents aged 15–19
- newlyweds
- women who were pregnant for the first time
- young married men and women with one child

Over the three phases of the project, some of the interventions included:

- capacity building of partner organizations
- support for door-to-door counseling, sensitization meetings, workshops
- support for community-level activities such as group meetings
- training of voluntary contraceptive counselors to promote family planning in their communities
- work with social marketing agencies to ensure steady supply of contraceptives
- advocacy activities at the state, national, regional, and international levels for urgent increased attention to programs that address youth reproductive health and fertility

[1]*Good Practices in Behavior Change Communication On Family Planning: Inception Report. Draft.*

#7: Maternal Health Situation Analysis

Maternal mortality has consistently declined in India, with a women's lifetime risk of maternal death dropping to 1 in 170 in 2010 from 1 in 38 in 1990. Despite this progress, urban-rural disparities persist in the quality of antenatal care, IFA and tetanus coverage, and ultrasound testing, with overall lower instances of the aforementioned in rural areas. Hemorrhage is the leading cause of maternal mortality in India, and anemia is a major cause of other pregnancy complications. A multitude of social and economic factors have been found to affect maternal mortality, including wealth, social status, education and gender norms.

Antenatal Care

- 76 % of women who had a live birth received antenatal care in the five years preceding the NHFS 3.
- 52% of mothers had three or more antenatal care visits.
- Urban women were much more likely to have three or more antenatal visits than rural women.

Quality of Antenatal Care:

- Fewer than three in four women had their abdomen examined during antenatal visits, and fewer than two in three received other services (weight, blood pressure measurement, blood/urine samples).
- Only 36% of women received information about pregnancy complications.

Anemia, IFA Coverage, and Tetanus Toxoid Injections

- Malnourished women are more likely to have miscarriages or stillbirths or to deliver babies with intrauterine growth retardation (IUGR) or low birth weight.
- Between 1998 and 2006, rates of anemia in pregnant women increased from 52% to 56%.
- IFA coverage and tetanus toxoid injections for older women, women with four or more children, women from rural areas, women with no education, and women in households in the lowest wealth quintile are well below the national average.
- 65% of women received or bought iron and folic acid (IFA) supplements for their most recent birth, but only 23% took them for at least 90 days as recommended.
- 76% of mothers received two or more tetanus toxoid injections during pregnancy for their most recent birth.

Ultrasound Testing

- 24% of all pregnancies in the five years preceding NFHS 3 underwent an ultrasound test.
- 44% of pregnancies in urban women underwent an ultrasound, compared with 16% in rural areas.
- Pregnant women with at least 12 years of completed education were almost eight times as likely to have an ultrasound test as pregnant women with no education.
- A higher percentage of pregnancies to women with no living son had an ultrasound test, and this percentage declines as the number of living sons increases.

Institutional Deliveries

- 39% of births in the five years preceding NHFS 3 took place in health facilities; more than 50% took place in the woman's own home; and 9% took place in parents' homes.
- The more ANC visits a woman had during pregnancy, the greater the likelihood that her delivery took place in a health facility.
- First births are more likely to be delivered in an institution than births at higher birth orders.
- Urban residence, education, and wealth are all strongly and positively associated with the likelihood of an institutional delivery.
- Only 13% of births to women in the lowest wealth quintile and 18% of births to women with no education and to scheduled-tribe women are delivered in an institution.

#7: Maternal Health Situation Analysis *(continued)*

Home Deliveries

- In 72% of deliveries that took place in the home, the mother reported that she did not feel that it was necessary to deliver in a health facility,
- Only 20% of home births used a disposable delivery kit (DDK).
- Customs and traditions are also cited as reasons for home deliveries.

Deliveries in the Presence of a Medical Professional

- 47% of births in the five years preceding NFHS 3 were assisted by health personnel.
- Of those above, 35% were assisted by a doctor and 10% by an auxiliary nurse midwife, nurse, midwife, or lady health visitor.
- 37% of births were assisted by a traditional birth attendant, and 16% were assisted by only friends, relatives, or other persons.
- Though the use of skilled birth attendants increased by 13% from 1992–2006, only 2% of that comes from women in the poorest wealth quintile.
- Cost can be a major factor in whether or not a medical professional is present, particularly in slums

Fathers and Maternal Health Care

- Only half of fathers were told about the importance of proper nutrition for the mother during pregnancy.
- Only 43% of fathers were told about the importance of delivering the baby in a health facility.
- Among fathers whose child was not delivered in a health facility, 48% were told about the importance of using a new or unused blade to cut the umbilical cord and 44% were told about the importance of cleanliness at the time of delivery.
- Only 36% of fathers were told about the importance of breastfeeding the baby and only 33% were told about the importance of keeping the baby warm immediately after birth.
- Younger fathers were less likely to attend antenatal visits.

Post Natal Care

- 58% of women did not receive any postnatal check-up after their most recent birth.
- Notably, 15–24% of institutional deliveries did not receive a postnatal check-up.
- Among births delivered at home, only 9–12% of births received a postnatal check-up within two days of delivery.

Sources: NHFS3, ICCDR Bangladesh, WHO, SIHFW Jaipur, Global Health Action Journal, World Health Organization,

#8: Family Planning Situation Analysis

Family planning (FP) rates in India are influenced by sociocultural norms that have limited the effectiveness of FP efforts and campaigns. Included among these are pressures on husbands and wives to complete their families quickly, and the preference for sons in many cases. To date, FP interventions have focused primarily on women, while men's roles have been neglected. Misinformation about family planning still persists, a notable example being that more than half of men incorrectly believe that a woman cannot get pregnant while breastfeeding. Gender imbalances in FP programming are also evident through the forms of contraception that couples are adopting. Despite consistent contraceptive interventions, female sterilization remains the most common method of FP. Men are not currently addressed as responsible partners and the use of condoms and/or male sterilization remains very low.

Descriptive Data – Fertility

- The Total Fertility Rate (TFR) in India has declined from 3.4 (NFHS 1) to 2.7 (NFHS 3 2005–6).
  - Urban-rural disparities exist with a TFR of 2.1 in urban areas and 3 in rural areas. The greatest fertility differences are by education and wealth. Women in the poorest households will have two more children than women in the richest households.
- Teenage pregnancy is common.
- Early childbearing is most common in rural areas and among women with no education.

Fertility-Related Preferences/Desires

- Unplanned pregnancies are relatively common. Among births, 10% were mistimed (wanted later) and 11% were not wanted at all. If all women were to have only the number of children they wanted, the TFR would be 1.9 instead of 2.7.
- Two-thirds of Indian women and men consider the ideal family size to be two children or fewer.
- Most men and women want at least one son and daughter. Nonetheless, son preference is widespread.

Contraceptive Knowledge

- Knowledge of contraception is nearly universal: 98% of women and 99% of men age 15–49 knew of one or more methods of contraception.

Contraceptive Use

- Female sterilization accounts for more than three-fourths of total modern contraceptive use.
- 63% of non-users of contraceptive methods stated that their husbands do not have a good opinion about using contraceptive methods (Pragati project – World Vision).
- Two-thirds of currently married women have used a FP method at some time in their lives.
- The contraceptive prevalence rate for currently married women in India is 56%, up from 48% in NFHS-2.
- Contraceptive use among married women varies by education, religion, caste, and wealth.
- Contraception use varies with parity; increasing from 34% for women with one child to 74% for women with three children, and then declining to 63% for women with 4 or more children.
- Modern contraceptive usage as reported by currently married women is only 48.5%.

#8: Family Planning Situation Analysis *(continued)*

- Women with sons are more likely than women without sons to be using contraception.
- 71% of modern contraceptive users obtained their method from a public sector source.
- More than 33% of users of temporary methods of FP discontinue use within 12 months of initiation.

Unmet Need for Family Planning

- Unmet need for FP among currently married women is 13%, down from 16% in NFHS-2, and unmet need decreases with age.
- Younger women (age 15–24) have a greater unmet need for spacing than for limiting. Rural women have higher unmet need than urban women for both spacing and limiting.

Family Planing Campaigns

- Slightly more than three in five women heard or saw a FP message in the few months before the survey, most often on television or radio. By contrast, over 90% of men have been exposed to FP messages in the past few months.

Informed Choice of Family Planning Methods

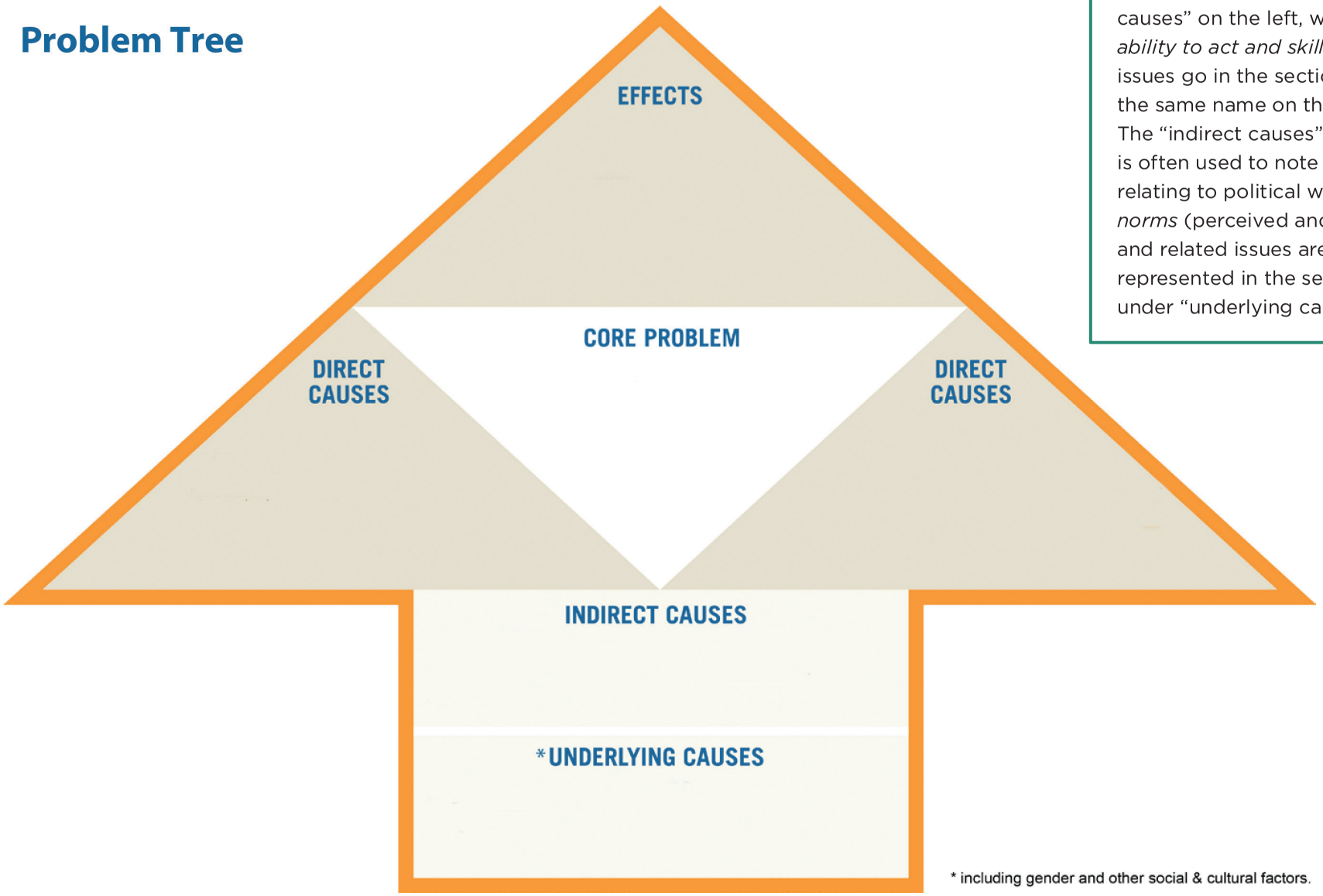
- Only about one-third of modern contraceptive users were informed about the side effects or problems of their chosen method, and only one-quarter were told what to do about side effects.
- Informed choice is consistently higher in urban areas, and is somewhat more common in private than in public medical facilities.
- Women who married over the age of 18 were more likely to use contraception to delay their first pregnancy
- Most men in India believe that women do not alone bear the responsibility for family planning (78%) and reject the idea that women using contraception may become promiscuous (84%).
- Nearly two-thirds of men know that a condom protects against pregnancy most of the time.
- In the slums of Bangalore, women are more likely to be sterilized if they have had at least one son. After three children, women with sons or daughters are equally likely to be sterilized.

Sources: NHFS-3, Global Public Health, Pragati Project

#9: Problem Tree

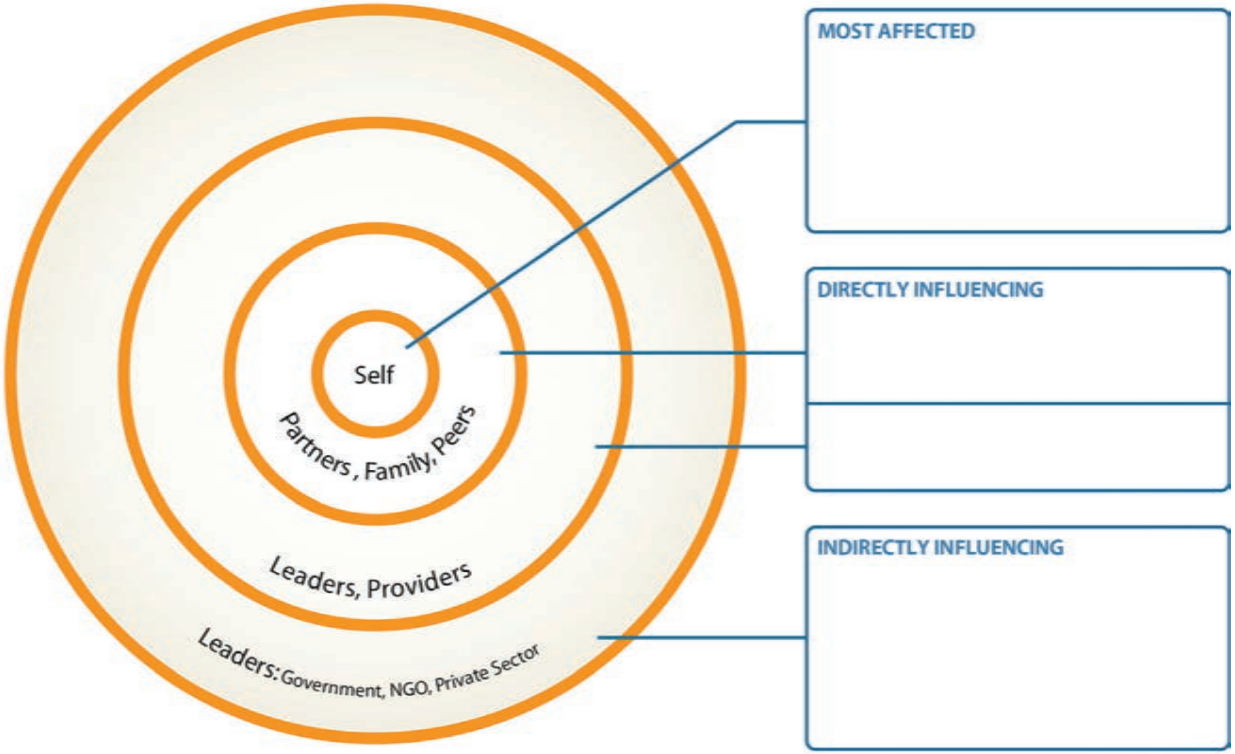
Tip: *Information, knowledge, and motivational issues* often go in the section under "direct causes" on the left, while *ability to act and skills*-related issues go in the section by the same name on the right. The "indirect causes" section is often used to note issues relating to political will, while *norms* (perceived and actual) and related issues are often represented in the section under "underlying causes."

Problem Tree



* including gender and other social & cultural factors.

#10: People Analysis



SOURCE: Adapted from McKee, Manoncourt, Chin and Carnegie (2000)

Directions: Using your Core Problem from the Problem Tree exercise, answer the following questions to fill in this worksheet.

- In the center is an individual (self). Ask: ***"Who are the people most affected by the health or development issue?"*** For example, they might be university students at risk of HIV.
- For the ring next to the center, ask: ***"Who are the people who have contact with the individuals in the center ring and directly influence them?"*** These people may also be directly affected by the problem, and could include sexual partners, and friends of the people in the center.
- In the next ring (third from the center), ask: ***"Who in the community allows for certain activities and also controls resources; controls access to, demand for services and products; and controls the quality of services and products delivered?"*** These could include clinic workers, ANMs, or community leaders.
- In the outermost ring, enabling environment ring, ask, ***"Who are the people, institutions, or organizations that indirectly influence those in the other rings?"*** These could include churches and religious leaders, business leaders, journalists, policymakers, and officials in the MOHFW.

#11: Context Analysis

Directions

- Begin by restating the core problem from your problem tree.
- Use your previous work on your Problem Tree Tool and your People Analysis to fill in your Context Analysis.
- Consider each of the groups mentioned in your people analysis.
- Use this table to write down what is known about each group. Not every box will apply. It might be helpful to indicate where more information is needed.

Core Problem:

What is Known about People's Context	People most Affected	People *Directly* Influencing Them (pick one)
Audience (groups of people from the analysis		
Community: Organization, Services, and Products What *community assets* can support or impede change? What services and products are accessible at the community level? What is their quality? Do people like them? Is transport available to *access* services? Are transport services and products subsidized so people can access them?		

#11: Context Analysis *(continued)*

What is Known about People's Context	People most Affected	People *Directly* Influencing Them (pick one)
Enabling Environment: Policy/Legislation, Politics/Conflict, Economics, Religion, Technology, Natural Environment What policies exist that support or impede change? How do political and religious *conventions* and *norms* influence these policies? Is there a *social movement* supporting this change? Are there any opinion leaders who can support or impede the change? How can the program work with them? What is the condition of the economic, technological, and natural environment?		
Information (*knowledge*) What information does each group receive about the health issue? How timely, accessible, or relevant is it? Through what channels? How do they react to it? What *knowledge* do they need?		

#11: Context Analysis *(continued)*

What is Known about People's Context	People most Affected	People *Directly* Influencing Them (pick one)
Motivation *(attitudes, beliefs)* What *motivates* people in each group to act? What are their *attitudes and beliefs*? What appeals to them? What do they want? How do *gender norms* make them more or less motivated? What key or additional information is missing that could help motivate them?		
Ability to Act *(skills, self-efficacy, access)* What *life skills* do people in each group have? What *assets*, strengths, resources, or *access* to services or products do they have? How confident are they in their ability to create change (*self-efficacy*)? How do *gender norms* contribute to or constrain their ability to act? Why?		
Norms *(perceived, socio-cultural, gender)* What are the deep, underlying values of each group, as reflected in *gender norms* and other social and *cultural norms*? How do these norms affect people's *knowledge, attitudes, beliefs, ability to act*, and, ultimately, their behaviors? How do these values and norms influence the health or development problem? Do all the people most affected and those who influence them have the same or different norms? What are the norms?		

#12: Qualitative and Quantitative Research Methods

Data collection method	Method type	Information gathered	Comments
Secondary data analysis	Qualitative or quantitative	The scope and severity of specific health, social, cultural, and economic issues supporting or blocking social and behavior change; individuals' knowledge, attitudes, perceived skills, and behaviors; social networks, socio-cultural norms, collective-efficacy, and community dynamics	› Contact researchers to see if secondary analysis is possible. › Work to include the program's issues and questions into ongoing surveys. › Take what is already done and build from it. (For example, use an old services-mapping study and shorten the research time to conduct an updated mapping.)
Key informant interviews	Primarily qualitative	Deep and rich views into behaviors, reasoning, and lives of people and policies that support or obstruct change; public opinions; socio-cultural norms and values; identification of existing players; suggestions for segmenting the population	› Develop an interview guide that will help obtain all the information needed from informants. › Test the guide and train interviewers to allow and encourage open-ended and free-flowing dialogue. › Identify informants by relying on existing committees or organizations in the community.
Public forum	Qualitative	Public opinion about the health or development issue (how important it is, how much of a problem it is believed to be, and causes of concerns); public perspective on the response of NGOs and the Ministry of Health to the issue; public opinion on current communication activities; generally accepted community norms and values	› Develop a discussion guide and prepare all logistics. › Focus on issues that are general in scope. › Be aware that many underlying causes may not come out in a public forum; they may be rarely spoken about in public and embarrassing to some participants.
Discussions	Qualitative	Good for general (social, cultural, and economic) community issues and norms and general opinions on the health or development issue and underlying causes; perceptions of the quality of communication programs serving community members and their social networks; leadership dynamics and patterns; overall community strengths and weaknesses	› Use a tested field guide (if one exists) with open-ended questions or engage an experienced qualitative researcher to help design the guide. › Ensure that groups are homogeneous—same sex, age, etc. › Keep the group size between 6 and 10 participants. › Hold at least two groups per demographic criteria as one may not work out.

#12: Qualitative and Quantitative Research Methods *(continued)*

Data collection method	Method type	Information gathered	Comments
			› Record the discussions, then transcribe for analysis. › Use a trained facilitator and trained note-taker.
Mapping	Quantitative, with some measure of quality of services	Information about service locations, target populations, number of people reached per month, geographic coverage, types of communication services offered; quantity and quality of communication materials on hand, the number of staff members dedicated to working on communication and change strategies; staff training experiences and needs; agency opinion and perceptions on the health or development issue, including its underlying causes, social norms, community dynamics; identification of community leaders and gatekeepers; perceptions of governmental policies that hinder or support possible interventions; other action groups that exist; relationships with and access to media; communication practices; current resource gaps and needs	› Look for existing mapping and update if possible. › Start with a community assessment committee for the initial list of service providers. › Talk with as many of the service providers as possible. › Gather at least the basic information on services, population served, and geographic coverage. › Work to obtain additional information on the environment, services, and barriers to change and their causes.
Population and sub-population level surveys	Quantitative	Representative population- and sub-population-level perceptions of the health or development issue; community norms and values; individual beliefs, perceptions, knowledge, and behaviors; underlying factors that may influence health or development issues; skills; social networks; community dynamics; communication patterns, access to and use of various communication channels; general public opinion on topics related to the health or development issue	› Address gaps in data with own survey. › Ensure calculations are made for necessary sample size. › Develop a sample frame. › Train interviewer staff well. › Pretest all data collection instruments. › Develop an analysis plan ahead of time. › Ensure planners have the skills for data entry and analysis.

#13: Research Gaps and Methods

Directions: As a group, review your team's problem tree, people analysis, and context analysis. Note places where more information is needed or where assumptions were used rather than facts. These will form your research gaps.

Based on your team's core problem and situational analyses, identify and list research gaps.	Is there existing research that can be used to fill this gap? If yes, what/where?	If not, discuss and list out what types of formative research might be used to fill these research gaps.

#14: Summary of Analysis

Directions: After considering all that has been documented from your analysis of the situation so far, write a concise problem statement. Add a list of changes that need to come about for the problem to be solved.

Using this formula helps to summarize the situation, people, and context analysis into one paragraph. (This usually takes up a couple of pages in a communication strategy's background section.).	
› **What's happening?** (from problem tree)	
› **Where and to whom?** (from people analysis)	
› **With what effect?** (from problem tree)	
› **Who and what is influencing the situation and with what effect?** (people analysis and problem tree)	
› **And as a result of what causes?** (problem tree and context analysis)	
› **What will improve the situation?** Consider information, motivation, ability to act, and norms.	
› **What are the desired changes in the environment?** Consider political will, resource allocation, policy change, institutional development, national consensus, and coalition building.	
› What are the desired changes in the social scene? Consider social movements, community leadership, network participation, ownership, access to services.	
› What are the desired changes in individual behaviors? Consider knowledge, attitudes, beliefs, skills, self-efficacy, perceived social norms.	

#14: Summary of Analysis *(continued)*

Final Problem Statement (#1–5)
Changes the Problem Calls For (#6–9)

#15: Communication Strategy Overview

Below is an overview of a communication strategy. You completed the first part, the summary of the situation analysis, in Module 1 (C-Planning Step 1—Understanding the Situation).

Communication Strategy Outline and Content		
Summary of Situation Analysis	› Problem statement › Research needs › Changes that the problem calls for › The theory of change	Completed in C-Planning Step 1
Communication Plan	› Final audience segmentation (focusing on the audience) › Barriers per audience › Desired changes per audience › Communication objectives per audience › Strategic approach based on the theory of change › Positioning › Key content, creating messages › Channels (per audience), activities, and materials	Complete in C-Planning Step 2 and 3
Draft Implementation Plan	› List of materials and activities by communication objective, with resources and timeline	Feeds into C-Planning Step 4
Draft Evaluation Plan	› Plan, including draft indicators, methods, and tools	Feeds into C-Planning Step 5

#16: Communication Plan Outline

Directions: Fill in the grid throughout the training. Since you'll use this worksheet throughout the rest of the training, keep it in a safe place.

Sections of the Strategy Document	**Your Strategy**
Summary of Your Situation Analysis (Completed in C-Planning Step 1)	
Problem Statement (From Module 1) Summary of problem tree, people analysis, and context analysis	
Research Needs (From Module 1) Questions that still need to be answered through research	
Changes the Problem Calls For (From Module 1) Changes (i.e., policy changes, services, products, norms, individual behaviors) that would lessen the problem	

#16: Communication Plan Outline *(continued)*

Sections of the Strategy Document	Your Strategy
Communication Strategy (Completed in C-Planning Step 2)	
Final Audience Segmentation › Which audiences (primary, secondary, tertiary) need to be addressed for changes to occur? › Which audience segments are a priority and why?	
Desired Changes Knowledge, attitudes, beliefs, behaviors, skills, self-efficacy, access, perceived norms, socio-cultural norms, policies, legislation, or something else	
Barriers and facilitators What gets in the way of the changes that are needed? What can assist in changes?	

#16: Communication Plan Outline *(continued)*

Sections of the Strategy Document	Your Strategy
Communication Objectives SMART communication objectives that address these key barriers. For example, "By the end of the project, there will be an increase in the proportion of women between the ages of XX–XX (audience segment) who: › know › feel confident that › start a dialogue about › do or take steps to do › learn skills to	
Strategic Approach › How are communication objectives to be brought together into one approach to work toward change? What is that platform called? Examples will be a concept or hook that becomes the umbrella tag line. *Why take a chance?* In the India MH campaign. › What will be the key strategy? › What will support it or link it to other strategies?	

#16: Communication Plan Outline *(continued)*

Sections of the Strategy Document	Your Strategy
Positioning › How will this approach stand out? › How will people remember the program or campaign? › What distinctive logo or image will people associate with the program? (Examples include The Blue Circle: Friendly Providers; Break the Chain: Change Is Possible)	
Key Content What is the key content to be communicated through each channel for each audience segment? (Remember, these are not messages; those are developed in Step 3.)	
Channels, Activities, and Materials Select channels, activities, or materials for each audience based on how to effectively reach a majority of them. Consider how channels reinforce each other to create an environment of change.	

#16: Communication Plan Outline *(continued)*

Sections of the Strategy Document	Your Strategy
Draft Implementation Plan (Finalized in C-Planning Step 4)	
A plan provides detail on each of the management considerations named below, as well as others deemed important to guide implementation. Name activities and materials to be created, keeping the budget in mind. › list of materials and activities › implementers (including partners and allies) › resources › timeline	
Draft Evaluation Plan (Finalized in C-Planning in Step 5)	
Think through reasons why the program should be evaluated. Draft an evaluation design, name process and outcome indicators, and plan methods and tools for data collection.	

#17: Audience Segmentation Mapping

Directions: One way to identify audience segments is using a mapping tool to map out the possibilities.

- Start with a draft set of audiences—primary, secondary, and tertiary—from the people analysis you completed previously.
- For each audience segment, check whether there are important differences within the group based on criteria in the Socio-Ecological Model for Change.
- For this exercise, we will have time to complete this only for your primary audience (the "self").

	Primary Audience	Secondary Audience	Tertiary Audience
***Enabling Environment*: What are the geographic or structural differences?** For example, urban/rural, place of residence or work, risk settings, border settings			
***Community*: What are the demographic and socio-cultural differences?** For example, age, gender, education, income, marital status, and their role in society, religion, ethnicity			
***Interpersonal*: What are the psychosocial differences?** For example, identity, lifestyles, membership in groups			
***Self*: What are the psychological differences?** For example, knowledge and information; motivation, including perceptions of vulnerability, the severity of disease; readiness for change; values, attitudes and beliefs with regard to the prevention solution.			

#18: Checklist for Audience Prioritization

Directions: Once audiences are segmented and mapped, there may still be a need to narrow down the possibilities and the sheer number of audience segments. Answering the questions below will help practitioners prioritize and identify the specific audiences on which to focus.

If your project runs for several months, or even years, consider reaching certain audiences in phases, say, one audience in the first year and then other audiences in the second year. For this exercise, we will have time to complete this for only one audience segment of your primary audience.

Potential Audience Segment	**Audience:** _____	**Audience:** _____	**Audience:** _____
How many people are estimated to be in this group?			
Does this group require specially prepared communication approaches or materials?			
How important is addressing this group to achieving the program goal?			
How likely is it that these audience members will change within the time frame of the program?			
Does the program have the resources to address this group?			
Final Decision: Will this be a priority audience?			

Adapted from O'Sullivan, Yonkler, Morgan, and Merritt (2003).

#19: Matrix for Change

Directions: Consider one or two of your audience segments. Name two desired changes for each of them, along with known and real barriers and facilitators to those changes. This sets you up to create your communication objectives that address key barriers. You will enter these in the column on the far right in the next session. A barrier/facilitator analysis is required for each audience segment. For this exercise, we will have time to complete this for only one segment.

Desired Change	**Barriers** Contextual or behavioral reason(s) why the audience is not doing the desired behavior	**Facilitators** Factors that enable the audience to perform the desired behavior	**Communication Objectives** Addressing Key Barriers
EXAMPLE: Audience Segment: Pregnant women ages 15–29 in Assam			
Use services (skilled birth attendants [SBAs], all ANC visits)	› Lack of awareness of services provided by skilled birth attendants (SBAs) › Low risk perception of pregnancy and home delivery › Poor knowledge of danger signs of pregnancy › Lack of proper counseling by frontline health workers › Lack of motivation to seek out SBAs and attend all ANC sessions › Perceived norm of home deliveries	› Friends or family members who delivered with an SBA › Familial support for ANC › Money saved for pregnancy and delivery	› By the end of the program, there will be an X increase in the percentage of women ages 15–29 who know at least three pregnancy danger signs. › By the end of the program, there will be an X increase in the percentage of women ages 15– 29 who believe they will have a healthier baby if they attend all ANC sessions.

#19: Matrix for Change *(continued)*

Desired Change	**Barriers** Contextual or behavioral reason(s) why the audience is not doing the desired behavior	**Facilitators** Factors that enable the audience to perform the desired behavior	**Communication Objectives** Addressing Key Barriers
Audience: _____			
Audience: _____			

Note: For communication to have impact, the objectives need to address key barriers for change and not just reflect a desired behavior.

#20: Communication Objective Examples

Information
By the end of the program, there will be an X increase in the percentage of women ages 15–29 who know at least three pregnancy danger signs.

By the end of the program, there will be an X increase in the percentage of women ages 15–29 who know where to seek SBA services.

Motivation
Within the next year, there will be an X increase in the percentage of women ages 15–29 who believe they will have a healthier baby if they attend all ANC sessions.

By the end of the program, there will be an X increase in the percentage of mothers-in-law of pregnant women ages 15–29 who encourage their daughters-in-law to have an institutional delivery.

Ability to Act
By the end of the program, there will be an X increase in the percentage of ASHAs who feel confident talking with women ages 15–29 about family planning.

Within the next six months, there will be an X increase in the percentage of frontline workers who use job aids when speaking with pregnant women about ANC and delivery services available to them.

Norms
By the end of the program, there will be an X increase in the percentage of frontline workers who believe they are advocates for their pregnant patients.

By the end of the program, there will be an X increase in the percentage of expectant fathers who believe other men in their communities accompany their spouses to ANC.

Tip: Use action verbs that can help break down desired changes into doable and realistic communication objectives.

- Use verbs like: know, have a positive attitude toward, consider discussing, feel confident, talk about, see benefit in, try out, practice, and learn skills.
- The advantage in using action verbs for communication objectives is that they will be formulated in a way that clearly demonstrates realistic results.

Remember, **SMART Objectives are**: Specific, Measurable, Attainable, Realistic, and Time-bound.

#21: Strategic Approach and Positioning Statement

Directions: Use the space on this worksheet to begin to develop a possible strategic approach. We will not have time during this training to develop positioning statements but the information is provided here for your reference. By the end of the program, there will be an X increase in the percentage of women ages 15–29 who know where to seek SBA services.

Example: Strategic Approach and Positioning Statement for Maternal Health in India

The strategic approach is to create a supportive environment for young couples to discuss, select, and use a hospital/institution for delivery of their baby. The program will: 1) work with young men and women directly to address benefits of delivering in an institution; 2) provide support to health care workers on FP/RH/IPC to increase the quality and their ability to provide friendly and accurate counseling sessions; and 3) increase the quality and quantity of positive media coverage of a hospital delivery, highlighting a young couple's story and the benefits of an institutional delivery.

This is the chosen strategic approach because research showed very low awareness of the benefits of institutional deliveries among young men and women who were having a baby for the first time.

Positioning statement: First-time parents can enjoy their pregnancies and their lives more if they are reassured that institutional deliveries are the safest, healthiest "way to go."

#21: Strategic Approach and Positioning Statement *(continued)*

Here's my strategic approach –

Remember: The strategic approach is the combination of strategies that will be used to achieve the named communication objectives.

It reflects how these strategies will work together to produce the desired impact. Use this worksheet to begin to develop a possible strategic approach.

The strategic approach is to

#21: Strategic Approach and Positioning Statement *(continued)*

Here's Our Positioning Statement –

Remember: Positioning creates a memorable cue for the audience to recognize program activities as part of an overall campaign or program. It helps people to understand why they should adopt a certain policy, idea, value, or behavior and why they should advocate for it to others.

Use the **positioning checklist** to review your positioning statement.

- ☐ Will the positioning resonate with members of your target audiences?
- ☐ Will it resonate over time, say a year from now? Is it different from what similar programs are offering?
- ☐ Does it represent something better or different than the known alternative?
- ☐ Does it provide a benefit that is worth the cost or effort?
- ☐ Can the program deliver the promise and/or benefit?

(Checklist adapted from Piotrow 1997)

#22: IPC as a Communication Channel

Small Group Instructions

1. Discuss the content of this hand-out within your small group.
2. Enlist a volunteer to present back in plenary:
   - your group's communication channel
   - two-to-three top benefits of that channel (from the handout or your group's experiences)
   - two-to-three top drawbacks of that channel (from the handout or your group's experiences)
   - one-to-two ways you could overcome those drawbacks when using the channel

---

Interpersonal (IPC) Activities include:

- provider-to-client
- peer-to-peer
- couple/partner dialogues
- small group activities

Potential Benefits of this Channel are:

- allows audience to ask questions and responses to be tailored to their situation
- able to discuss complex information and behaviors
- can build skills through demonstration and practice
- can increase self-efficacy can increase intentions to act
- provides an opportunity for the audience to learn from each other and solve problems together

Potential Drawbacks:

- requires training on materials developed
- requires a plan for distribution and monitoring of supply of materials
- requires supervision of implementers
- requires motivation and or incentives because it is a time-consuming activity

#23: Mid-Media as Communication Channels

Small Group Instructions

1. Discuss the content of this hand-out within your small group.
2. Enlist a volunteer to present back in plenary:
   - your group's communication channel
   - two-to-three top benefits of that channel (from the handout or your group's experiences)
   - two-to-three top drawbacks of that channel (from the handout or your group's experiences)
   - one-to-two ways you could overcome those drawbacks when using the channel

---

Community Based/Mid-Media Activities include:

- church/mosque bulletin boards
- community or parent–teacher meetings
- stop-and-go drama
- street theater
- cultural fairs and
- melas

Potential Benefits of this Channel are:

- can stimulate community dialogue
- can motivate collective solutions
- provides social support
- can increase intentions to act
- reaches large numbers of primary and secondary audiences
- usually low cost

Potential Drawbacks:

- requires planning
- relies on others not directly related to your project
- difficult to ensure that correct and consistent messages are provided
- usually requires multiple implementation sites to reach scale

#24: Mass and Social Media as Communication Channels

Small Group Instructions

1. Discuss the content of this hand-out within your small group.
2. Enlist a volunteer to present back in plenary:
   - your group's communication channel
   - two-to-three top benefits of that channel (from the handout or your group's experiences)
   - two-to-three top drawbacks of that channel (from the handout or your group's experiences)
   - one-to-two ways you could overcome those drawbacks when using the channel

---

Mass and Social Media activities include:

- television
- radio
- newspapers
- billboards
- transit advertising I
- internet (Facebook, Twitter, blogs, YouTube videos, pod-casts)
- SMS

Potential Benefits of this Channel are:

- extensive and rapid reach
- efficient and consistent repetition of message
- social media potential to mobilize youth effectively

Potential Drawbacks:

- expensive to produce and air
- requires repeated exposure over a period of time to achieve results
- lack of access to audience (no TV, phone, computer, Internet connectivity)
- limited ability to interact or personalize
- creates awareness easier than it changes behaviors, especially complex ones

#25: Draft List of Activities with Matching Channels and Materials by Audience

Directions: Once potential communication channels have been selected, the next step is to prioritize resources in the development of a manageable set of materials and activities.

1. Summarize your key activities or interventions by audience.
2. Make a selection of channels and materials that support your key activities, based on audience's preferences and your budget. Remember, channels and materials should not be considered separately from the overall program design. Instead, they should be integrated with other program activities and service delivery.
3. Name the key content for each audience segment through each channel (time permitting).

Final Channel Selected (IPC, community-based, or mass or social media)	**Key Activities Chosen, for this Audience Segment**	**Materials to Support Activities**	**Key Content to Communicate through each Channel**
Audience Segment: First time pregnant women between the ages of 18–29.			
Interpersonal	*Face-to-face counseling with midwife*	*Handbook in pocket size as job aid for midwife, designed for low literacy*	*Benefits to mother, baby, and family of delivering at hospital/ institution*

#25: Draft List of Activities with Matching Channels and Materials by Audience *(continued)*

Final Channel Selected	Key Activities Chosen, for this Audience Segment	Materials to Support Activities	Key Content to Communicate through each Channel
Audience Segment: _____			
Audience Segment: _____			

#26: Inventory of Existing Materials and Activities

Arguably, the greatest inefficiencies in the world of SBCC are the time and money invested in developing activities and materials that have already been developed by other programs. Starting with an inventory of existing activities and materials can save enormous amounts of time. Resources are put to better use by complementing and/or adapting rather than recreating what already exists.

- Consider the materials that your program will need.
- In the space below, write the names or sources of materials you've heard about or are familiar with.
- Consider the ways in which you might adapt or complement what you find.

	Materials Needed **(as listed in communication strategy)**	**Materials Developed in the Past**	**Ways to Complement or Adapt Materials Already Developed**
Interpersonal (e.g., counseling cards, flip-chart)			

#26: Inventory of Existing Materials and Activities *(continued)*

	Materials Needed (as listed in communication strategy)	Materials Developed in the Past	Ways to Complement or Adapt Materials Already Developed
Mid-media (e.g., street theater, rallies)			
Mass media or social media (radio programs, blogs)			

#27: Relationship between the Communication Strategy and Creative Brief

Overview of the Strategy (Step 2 in C-Planning)	
› Summary of the Analysis	› Problem statement › Changes the problem calls for
› Communication Strategy	› Final audience segmentation › Barriers (per audience) › Communication objectives (per audience) › Strategic Approach › Positioning › Key Content › Channels (per audience), activities, and materials
› Draft Implementation	› List of activities and materials, by communication objective, with resources and timeline
› Draft Evaluation Plan	› Plan, including draft of indicators, methods, and tools

Overview of the Creative Brief (Developed for *each material or activity* named in the strategy)
Goal and Audience(s)
Changes, Barriers, and Communication Objectives
Message Brief
Key Content and Tone
Media Mix and Other Creative Considerations

Creative Brief Overview

There are 5 categories contained within the creative brief. What is included in each category is detailed here.

› Goal and Audience	› Overall aim of the activity or material › Selected audience(s)
› Communication Objectives	› Communication objectives addressing desired changes and barriers
› Message Brief*	› Key promise › Support statement (aspirations) › Call to action
› Key Content and Tone	› Key content to communicate in this activity or material › Tone for this activity or material
› Media Mix and Other Considerations	› How this material complements or is supported by other activities or materials in the mix › Other creative considerations

*The Message Brief is made up of these elements:

1. The key promise selects one single, subjective promise or benefit that the audience will experience by hearing, seeing, or reading the objectives the program has set.
2. The support statement includes the reasons the key promise outweighs the key barriers and why what is promised or being promoted is beneficial. These often become the key messages.
3. The call to action communicates what the audience should do after hearing the message.

#28: India Example: Creative Brief for Maternal Health Campaign

1. Goal, Audience, and Communication Objectives	
Goal › Increase institutional delivery and minimum 48-hour stay in a health facility by promoting the benefits of JSSK › Increase uptake of full antenatal care (ANC) services (minimum of 4 visits) › Increase the number of pregnant women who take 100 iron folic acid (IFA) tablets and have hemoglobin levels checked during ANC visits	
Selected Audiences *Primary Audience (this creative brief)* › Women of reproductive age (WRA) and their husbands, between 15 and 29 years, living in rural, urban. and semi-urban areas *Primary Audience (this creative brief)* › Mothers-in-law/family members/peers (those in direct regular contact with couples) › Outreach community-based workers—ASHA, block extension educators (BEEs) › Health facility-based workers—ANMs *Tertiary Audience (will have a separate creative brief)* › Religious leaders/other community influentials and media	
Desired Changes **WRA**	› Deliver in a health facility and stay 48 hours after delivery. › Register at the nearest health facility as soon as pregnancy is determined. › Complete least four ANC visits during pregnancy. › Increase regular consumption of iron-folic acid (IFA) tablets and consistently check the hemoglobin count.
Husbands	› Support and encourage their wives to deliver in a health facility and stay 48 hours after delivery. › Support and take wives to register at the nearest health facility as soon as the pregnancy is determined. › Support and remind wives to complete at least four ANC visits during pregnancy. › Remind wives to take (IFA) tablets.

#28: India Example: Creative Brief for Maternal Health Campaign *(continued)*

Communication Objectives **WRA**	› By the end of the program, increased percentage of WRA will know that JSSK is a free and cashless service for pregnant women. › By the end of the program, increased percentage of WRA will feel motivated to contact their nearest health facility to register the pregnancy as soon as they become pregnant. › By the end of the program, increased percentage of WRA will believe in the importance of completing four ANC visits. › By the end of the program, increased percentage of WRA will know that all pregnant women should consume 100 IFA tablets and during ANC have iron levels checked. › By the end of the program, increased percentage of women who deliver at a facility who feel confident that if problems arise for the mother or baby, the trained provider knows how to treat them.
Husbands	› By the end of the program, husbands will feel confident in supporting their wives to register at a health facility and attend 4 ANC visits. › By the end of the program, husbands will feel motivated to support their wives to deliver in institutions and stay at the facility for 48 hours.
2. Message Brief	
The Key Promise If you attend all your ANC appointments and deliver at a health facility you can have a healthy baby.	
The Support Statement Because we all play a part in ensuring our baby's health.	
Call to Action › Deliver in a health facility and stay 48 hours for a safe delivery and healthy baby. › As soon as you know you are pregnant, go and register your pregnancy with the nearest health facility or provider. › Complete at least four ANC visits during pregnancy. › Take your IFA tablets regularly as prescribed by your health provider and during ANC visits have your iron levels checked.	
3. Key Content and Tone	
Key Content The communication campaign will address barriers, myths, and misconceptions associated with delivering in a health facility, seeking antenatal care, eating nutritious food, and other known barriers listed in the project's communication strategy.	
Tone or Appeal The campaign will be informative, motivating, and appealing to families' desires for healthy babies and mothers.	

#28: India Example: Creative Brief for Maternal Health Campaign *(continued)*

4. Creative Considerations

Media Mix/Activities

Mass media, mid-media, interpersonal, and participatory community-based media will be used

Advertising Medium	Size/Length	Format/Materials	Number of units for budget quote
Television spots	60 seconds with 30- and 15-second edits	Digi beta master with copies in mpeg3 format or as agreed	1 x 60 sec 3 x 30 sec (new) 4 x 15 second edits
Radio spots	60 seconds with 30- and 15-second edits	DAT tapes with copies in wmv/mpeg3 format or as agreed	1 x 60 sec 3 x 30 sec (new) 4 x 15 second edits
Songs and jingles	180 seconds (songs) 90 seconds (jingles) 60 seconds 30 seconds	DAT tapes with copies in wmv/mpeg3 format or as agreed	1 x 180 sec 1 x 90 sec (new) 2 x 60 sec edits 2 x 30 second edits
Street play scripts	15 min. plays	Softcopy in word format	4
IPC counselling cards	A 10 page flip chart size A4, 4 color with photography; two sided, one side mostly text		1
Designs for 4-color billboards and wall paintings	Designs that accommodate the following ratios 1:1; 1:2; 2:3; 3:4		4
Designs for 4-color posters	23” x 18” with photographs		4
Design and text for 4-color flyers and leaflets	Single fold half A4 size, color, both sides with photographs		4

Openings, Creative Consideration, Cost, and Timing

- Openings: Maternal and child health days
- Creative considerations: Low literacy, language and images that appeal to primary audiences
- Cost and timing: Simultaneous rollout of campaign materials

#29: Analyzing Examples of SBCC Materials

Directions: Review a sample communication material and consider the following questions:

1. What do you see in the sample material?
2. What would you guess is in the creative brief for this material?

Section of Creative Brief	Guiding Questions	Responses
› Audience	› Who is this material intended for?	
› Changes, Barriers, and Communication Objective(s)	› Desired Change; What change is this material asking for? › Barriers: Why is the change not happening? Can you see the barriers that this material addresses? › Communication Objective(s): What is the objective/aim of this material?	
› Message Brief	› Key Promise/Benefit: If the viewer does what, what will happen? What is the benefit? › Call to Action: What is the material asking a person to do?	
› Key Content and Tone	› What is the tone? › What key information is in this material?	
› Other Creative Considerations	› Are there any other creative considerations—such as literacy levels, graphics, and languages?	

#30: Creative Brief Worksheet

Purpose: This worksheet will assist programs to develop a creative brief for materials. Programs can use this creative brief for one type of material or a series of materials for the same audience.

Directions:

- Based on the birth spacing example provided, craft the message brief (key promise, support statement, and call to action).
- For this exercise, the first sections of the creative brief have been pre-populated to provide background to support developing the message brief.
- Groups do not need to complete the other blank sections of this worksheet now but they are provided here for participants use when developing a full creative brief.

Section	Your Creative Brief
1. Goal and Audience	
Goal: What are you trying to achieve? **Selected Audiences** › Primary: People most affected by the problem › Secondary: People who directly influence the primary audience, either positively or negatively › Tertiary: People who indirectly influence the primary and secondary audience	**Goal**: SBCC campaign to garner spousal support and participation in birth spacing **Primary**: Unsterilized husbands of unsterilized women ages 15–29 **Secondary**: Wives, mothers-in-law, peers, ASHAs, ANMs, block extension educators **Tertiary**: Religious leaders, community influentials, media
2. Charges, Barriers, and Communication Objectives: Directly address barriers to change	
Communication Objective Addresses the key barrier to the desired change *Example: After the next health fair, there will be an increase in the number of* _____ *(audience) who* _____.	**Changes**: Spacing of at least three years between births **Barriers:** Social and familial pressure for children, son preference, lack of communication addressing men's role in family planning **Communication objective**: By the end of the campaign, there will be an increase in the number of married men who believe spacing of at least three years between births ensures better family health.

#30: Creative Brief Worksheet *(continued)*

Section	Your Creative Brief
3. Message Brief/Content:[2] Formulated from an audience's point of view to guide writers, designers, and producers in designing and developing messages.	
The Key Promise Provides a compelling, truthful, and relevant benefit that the audience receives by taking the desired action Example: If you feel confident talking to your wife about ANC, you will be considered a good husband.	
The Support Statement Convinces the audience they will actually experience the benefit; reasons why the key promise outweighs key barriers; often becomes the message *Example: Because a good husband cares about his family's health.*	
Call to Action Tells your audience what you want people to do or where to go to use the new product Example: For more information, visit your nearest clinic at _____.	
4. Key Content and Tone: Expands upon the message brief and provides more detail.	
Key Content What is relevant to your audience in order to achieve the communication objective to bring about change? May be bullet points, grouped in the order they should appear in the material.	
Tone or Appeal Helps convey the key promise. What feeling or personality should your communication have, based on your key promise (e.g., humorous, logical, emotional, positive, or comic)?	
5. Creative Considerations: Describes how this activity or material relates to others you are creating and anything else you feel is important to keep in mind when creating, producing, or distributing this communication product.	
Media Mix/Activities Details on the campaign or series of activities to which this activity or material contributes	

[2]*This section of the creative brief was developed in Section F: Developing Effective Messages.*

#30: Creative Brief Worksheet *(continued)*

Section	Your Creative Brief
Openings, Creative Consideration, Cost, and Timing › Openings: What opportunities exist for reaching the audiences (e.g., market day, health fairs)? › Creative considerations: Is there anything else the creative people need to know? Will the material or activity be in more than one language? What style and illustration type is preferred? What are the reading levels of your audiences? Is there anything particular regarding style, layout, or visuals? What logos need to be used? How is this material branded? › Cost and timing: How much will the activities or materials cost, and when do they need to be ready? Do you have adequate funds to create everything?	

#31: Seven Cs of Effective Communication

The Seven Cs of Communication[3]	Checklist to Review Crafted Messages[4]
1. Command attention	☐ The message stands out to the audience. ☐ The message is believable.
2. Clarify the message	☐ The message is simple and direct. It is focused only on what the audience needs to know. ☐ The strongest points are given at the beginning of the message.
3. Communicate a benefit	☐ The message clearly states what the audience gets in return for taking action. ☐ The message conveys that the benefit outweighs the barriers.
4. Consistency counts	☐ Key messages are used appropriately and ensure consistency and support for all the programs materials.
5. Cater to the heart and the head	☐ The message uses an appropriate tone for the audience. ☐ The appeal is appropriate as laid out in the creative brief.
6. Create trust	☐ The information comes from a credible source.
7. Call to action	☐ The call to action clearly states what the audience should do after seeing the communication. ☐ The call to action is realistic.

[3] *Piotrow, et al 1997*

[4] *Adapted from Piotrow, et al 1997; HC Campaign Dev. Toolkit*

#32: Reviewing Creative Considerations for Materials - A Final Check

Directions: This checklist can help practitioners gauge whether audiences will understand, accept, and respond to proposed messages and materials. A stakeholder review and pretesting with audiences will provide answers to many of the questions in the checklist.

Appropriate Text (or spoken language) › Plain language is used. › Short, uncomplicated sentences are used.	› Fonts are familiar and easy to read. › Reader can easily follow the text.
Attractive Visuals › Visual and artwork are similar in style. › Photos or drawings stand out. › Images present one piece of information. › Images are straightforward and simple, rather than abstract, detailed, or busy.	› Images of people and things are culturally appropriate. › Colors selected attract attention. › Familiar symbols and images are used.
Appealing Design and Layout (for Print Materials) › A consistent design is used. › Fonts are easily read by audience. › Print size is appropriate for the material. › Layout is clear and easily followed. › The amount of white space is appropriate. › Colors have good contrast.	› Emphasis (e.g., bolding) is used appropriately. › Titles, headers, numbers, and bullets assist audience to navigate the material. › There are a limited number of styles (text and visuals) in the material.
Media Mix › Mix considers what other materials are being developed by the program. › Mix ensures the material fits within a larger campaign or program.	› Mix supports your communication objectives. › Activities support the use of the material.
Openings › Existing events and activities are considered. › Regular events where materials can be used are listed and reviewed.	› Organizations that hold regular events are listed and reviewed for possible collaboration.
Considerations for Radio and Television › Audience can relate to the voices and actors in the script. › Audience can trust voices, accents, and actors to give them information. › Voices sound balanced or natural. › Music or sounds are used to attract attention, spice up a spot, and establish a mood.	› Spot has a signature tune or logo. › Sound effects establish a place, mood, time, or transition effectively. › Meaningless sound effects are removed. › Script and/or storyboards have been reviewed and formatted.
Cost and Timing › Development and production costs budgeted. › Testing has been budgeted.	› Program has sufficient budget. › Development timeline has been created and reviewed.

[5]*Kols 2007; National Cancer Institute 2001; Population Communication Services 2003; Younger et al. 2001; Kids style manual; HRA Communication Tips; C-Bulletins*

#33: Summary of Types of Testing for Materials

Below is a quick overview of the three types of testing covered in this toolkit.

Type Testing	Concept Test	Pretest
Purpose of Test	› Reaction to key messages › Reaction to proposed material formats › Information on what motivates and interests the audience	› Reaction to draft materials—visuals, text, colors, audio › Feedback on materials about comprehension, attractiveness, acceptance, involvement
When	› Before drafts are developed	› After concept testing and development of first drafts
With Whom	› Intended audience	› Intended audience › General public › Users
Materials Needed	› Drawings, black and white printouts, or mock-up designs › At least two draft formats or concepts to determine which one is preferred	› Drafts of materials
Methodology	› Focus group discussions, in-depth interviews, intercept testing	› Focus group discussions, in-depth interviews, intercept testing

#34: Checklist - Production of Quality Materials

Print Materials - Guidance to Printer	☐ Determined electronic versions are correct ☐ Printers are knowledgeable about the materials they are producing ☐ Agreed upon production schedule and completion date ☐ Agreed upon product packaging ☐ Agreed upon delivery method ☐ Determined quality of paper and binding ☐ Determined colors ☐ Visited printer to ensure appropriate equipment ☐ Requested color proof before printing full order if the print run is large ☐ Other: _____ ☐ Other: _____
Print Materials - Reviewing Print Materials Proof	☐ Paper quality, size, binding are correct ☐ Photos, illustrations, and text are clear and not distorted ☐ Colors do not bleed ☐ Binding and/or tabs do not interfere with material content ☐ Pages are in correct order ☐ Tabs are in appropriate space ☐ Other: _____ ☐ Other: _____
Radio/TV spots - Final Production	☐ Fully produced spot is correct length ☐ Content is correct ☐ Image and sound quality are as agreed ☐ Sounds effects, voices, music, actors, background is as requested ☐ For TV, the spot is in focus and transitions are as requested ☐ The sound is clear without distortions or background noise that was not requested ☐ Spots are copied onto CDs/DVDs in appropriate format for stations ☐ Other: _____ ☐ Other: _____
Online Materials - Final Review	☐ Page appears on screen as desired (use multiple sized monitors to check) ☐ All links work and direct people to the appropriate page/content ☐ All images and text are clear and undistorted ☐ Other: _____ ☐ Other: _____
Community-based/Mid-Media	☐ Scripts or formats clearly present campaign messages ☐ Content is entertaining (if applicable) ☐ Opportunities for community engagement/feedback are present ☐ Theater troupes or other related vendors have been trained ☐ Routes/event schedules have been planned to ensure optimal target audience attendance ☐ Other: _____ ☐ Other: _____

#35: Sample Excerpt of Implementation Plan

List of Activities	Implementers	Resources	Timeline
Communication Objectives: By the end of the program, there will be: › an increase in the number of couples who know about modern contraceptive methods (MCM) and their benefits › a decrease in fear and misconceptions about MCM use among couples			
Activity 1: Develop, launch, and sustain integrated SBCC mass and print media campaign			
Develop draft communication materials	MOHFW, creative firm	Creative firm contract	Q1
Pretest campaign materials	MOHFW	Research contracts	Q2
Produce final campaign materials	MOHFW; creative firm, printer	Creative firm, print contracts	Q2
Implement and monitor campaign	MOHFW; partners	Travel	Q3-4
Activity 2: FP/MCM frontline health worker communication			
Develop training	MOHFW	Consultant	Q1
Training of trainers for ASHAs	MOHFW;NIHFW	Training Costs	Q2
Conduct and monitor ASHA counseling sessions	MOHFW	Travel, facilitator costs	Q3-4
Activity 3: Mid-media activities			
Develop scripts for mid-media	MOHFW	in house	Q2
Pretest scripts for mid-media	MOHFW	in house	Q2
Train theater groups	IHBP, theater partner	Training Costs	Q2
Conduct and monitor community sessions	IHBP, theater partner	Travel, theater contracts	Q3-4

#36: Integrating the Campaign into the Implementation Plan Worksheet

Directions: Use this worksheet to plan out what you need to complete to implement your communication campaign.

- Think about your main activities for the communication campaign and what materials are needed to implement them.
- What needs to be done to finalize the materials? We are thinking beyond production.
- Reviewing your implementation plan, what time is needed?

Campaign Component	Materials Needed	Activities	When this needs to be done
Example: Street theater for xxx	*Scripts, props, leaflet for dissemination*	*Hiring and training of theater group* *Performances*	*By December x*

#37 Budgeting

The information below is meant to guide budget categories and line items to when planning implementation of your communication campaign.

Types of Costs	Estimates
Materials › Creative Agency › Airtime › Printing › Distribution › Other: _____	
Events › Hiring/Fees for performers/facilitators at rallies › Giveaways (e.g., stickers and t-shirts) › Press conferences and kick-off events › Honoraria for dignitaries and celebrities › Rental of sites, public address systems, other equipment › Transportation to site and back › Other: _____	
Ongoing Training and Capacity Development › Consultant and trainer fees › Per diem, transport, and accommodation for participants › Reproduction of training materials › Rental of training site, equipment purchase or rental › Other: _____	
Monitoring and Evaluation › Development, distribution, and collection of M&E data › Orientation of trainers and training of field workers › Travel allowance for supervision and/or quality assurance of data collection › Compilation and analysis of data › Organization of feedback session(s) › Fees or salaries for researchers › Other: _____	
Other › Communication (e.g., telephone, Internet, fax, postage) › Administrative and overhead costs › Other transportation costs › Other: _____	

#38: Placement of Materials

Channel	Use and Placement	Tips
Mass Media	› Choose stations or carriers—cell phones, or webpages—that your intended audience listens to or uses. › Review stations for audience size (reach), audience profile. › Air spots during times your audience is listening or viewing. › Air and disseminate for at least 3–4 months. › Air spots at least twice a day on each station. For example if you have 3 radio spots on 2 stations – make sure they are aired 2 times a day x 3 spots x 2 stations = 12 times/day. This is a good rule of thumb.	› Don't bring personal bias to media decisions, base it on data, e.g., don't refuse to buy time on a certain station because you don't like a presenter or show. › Ensure play or disseminate materials enough that the audience can hear, understand, remember, and try desired change. › Don't rely solely on free air time. › Work with the government media placement agency to determine where best to air your mass media.
Print Materials	› Place materials where people can view or access them. › Choose a space where they stand out and will gain attention. › Choose an appropriate size for the space. › Place in a space where they will not be damaged or can easily be replaced. › Select an appropriate space where audience can view the entire material.	› Find a space where your audience has time to stop and view or interact with the material. For example if it is a leaflet, place it somewhere they spend enough time to review the material. › Place the material, especially posters, where there is little competition for viewing it, but is in a place your target audience frequents and will see it.
Interpersonal and Mid-media	› Choose an appropriate location and time of day to hold the event if it is in the community based on the target audience. › Ensure there is enough space for backdrops and props. › Find a location that is not too noisy and the audience can hear and see. › Set clear objectives for the event since this will affect the size of the desired group. › Determine what you want your audience to do since this will influence how many times you should repeat or reach your audience.	› If this is a dialogue or small group discussion, select a spot that is intimate and encourages discussion. › If the event is a public rally or street theater, find a spot that attracts your target audience. › Be prepared for people who are not your target audience to attend the event. › For discussions and dialogue there are no more than 20–30 people. › If the purpose of the event is more than just sharing information meet or interact the audience at least 3 distinct times.

#39: What Will You Monitor?

The first step in developing a monitoring plan is to figure out what you want to monitor and what questions you want answered. The simplest monitoring is counting the number of materials disseminated and activities completed. This can be done through developing tracking templates. Think beyond just counting.

As you determine what will be monitored keep the following in mind.

What to Monitor	Example Questions to Ask	Your Questions
Logistics	› Is your campaign being implemented as planned? › Are the program components such as print materials and supplies being delivered on time, in the right place, by the right people, to the right audience?	
Distribution of print materials	› Are your materials placed where your audience can see and read them? › Have your materials reached their intended audience? › Are the materials being used? › Are audience members taking home the materials?	
Mass media broadcasts	› Are the spots being broadcast at specified time on the stations selected? › Is the mass media plan being followed by the stations? › Is the campaign reaching the intended audience?	
Mid-media activities	› Are scripts being followed? › Are key messages consistent? › Are the target audience members attending these events? › Are the events being held according to the schedule and specified location?	
Exposure	› Are you reaching enough of the intended audience? › Has the audience been exposed to the campaign?	
Training plan	› Is the training on schedule, delivered as designed?	
Attitudes	› Is there evidence that there is a negative reaction to the campaign? › Is there evidence that people are tired of hearing or are ignoring the campaign?	

ANNEX A

Pretest and Post Test

1. What best defines social and behavior change communication?

a. It uses a variety of communication strategies to influence individual and collective behaviors that affect health.

b. It uses advocacy to bring about social change within the health environment.

c. It uses mass media to communicate the importance of health changes to the population.

d. It uses behavior change communication to influence individuals to change health behaviors.

2. From which level does a socio-ecological model address change?

a. Individual

b. Community

c. Socio-political environment

d. All of the above

3. Which of the following is a key characteristic of SBCC?

a. SBCC is an interactive, researched, and planned process that aims at changing social norms as well as individual behaviors.

b. SBCC uses a socio-ecological model for change.

c. SBCC operates through three key strategies: advocacy, social mobilization, and behavior change.

d. All of the above.

4. During a situation analysis information is collected on

a. The health issue

b. Audience

c. Desired changes

d. Barriers that impede change

e. All of the above

5. What is not part of a problem statement?

a. What is happening?

b. Where and to whom?

c. Which strategy will we use?

d. With what effect?

e. Who and what is influencing the situation?

6. A communication strategy can be used to

a. Provide clarification to managers if asked about what you are trying to accomplish

b. To see if new ideas are in line with your current program

c. If resources get tight, you can review the strategy and decide what to let go without losing what is important for success

d. All of the above

7. Communication objectives are audience specific, measurable, and what else?

a. Include detailed descriptions about the various audiences

b. Address barriers to change that the audience will face

c. Tell the audience what they are doing wrong

d. Are the same as the overall program objectives

8. Which is not a step of developing an SBCC strategy?

a. Develop communication objectives to address barriers

b. Segment and prioritize audiences

c. Develop strategic approach and positioning of program

d. Identify desired changes and barriers

e. Identify key content and channels for activities and materials

f. Monitor the program

9. Your activities will have the greatest impact if

a. You identify one channel and stick with that for all your activities

b. You strategically combine communication channels so that messages and activities mutually re-enforce each other

c. You primarily use print media in communicating your messages

d. None of the above

10. Why is a creative brief important?

a. It can be used as a reference throughout the material and activity development process to keep focus

b. It can be given out to partners and gatekeepers as a summary of your materials and activities

c. It can be used as an evaluation tool

d. A and B

11. Which of the following is generally NOT part of a creative brief?

a. Goal and selected audience(s) for materials and activities

b. Desired changes, barriers to change, and communication objectives

c. Names of program staff who will work on the material or activity

d. A message brief

12. Circle the correct types of testing with their definitions.

12a. Tests audience's reaction to message content and possible ideas and formats

a. Concept testing
b. Pretesting
c. Stakeholder Review

12b. audience's members' reactions to drafts of materials

a. Concept testing
b. Pretesting
c. Stakeholder Review

12c. Specialist, partners, and gatekeepers ensure messages are technically correct

a. Concept testing
b. Pretesting
c. Stakeholder Review

13. What is a major expense category that should be included in an SBCC budget?

a. Communication research and planning
b. Special events
c. M&E
d. Production of SBCC broadcast and print materials
e. All of the above

14. What is the purpose of evaluating health communication programs

a. Determine if they are effective in reducing barriers and increasing desired behaviors
b. Determine the relative effectiveness of different components of the program
c. Determine if the program is having unintended consequences
d. Determine what program models are effective and can be taken to scale
e. All of the above

15. Lessons learned from the program and M&E results should feed into replanning of a program.

a. True
b. False

ANNEX B

Workshop Evaluation

In order to improve the quality of the SBCC Capacity Strengthening Workshop, we are requesting feedback from you. We would be grateful if you fill in the questionnaire as honestly as possible. Your comments are an important contribution as we design learning experiences to meet your professional and organizational needs.

What did you particularly like about the teaching and learning approach? (Check those that apply.)

- ☐ Small group work
- ☐ Feedback you received
- ☐ Tools/worksheets (specify: _____)
- ☐ Timing/pace
- ☐ Examples used
- ☐ Facilitation style
- ☐ Other: _____

What might have worked better for you?

- ☐ Small group work
- ☐ Feedback you received
- ☐ Tools/worksheets (specify: _____)
- ☐ Timing/pace
- ☐ Examples used
- ☐ Facilitation style
- ☐ Other: _____

ANNEX B: WORKSHOP EVALUATION

Review the following statements and tick in the appropriate box.

About the Course	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The workshop met the established objectives					
The course structure was logical					
The tools provided were useful					
The content and activities of the course were consistent with my expectations.					
The course will help me to do my job better.					
I would recommend this course to other persons and organizations.					
The amenities (space, seating, meals) were satisfactory.					
The amenities (space, seating, meals) were conducive to learning.					

About the Facilitator	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The facilitators were well prepared.					
The facilitators were knowledgeable on the subject matter.					
The facilitators explained the material clearly.					
The facilitators were enthusiastic about the subject matter.					
The facilitators stimulated thoughts and encouraged discussion.					

How will you apply what you have learned in this training within your organization? 	What do you feel were the weaknesses of this workshop? 
What do you feel were the strengths of this workshop? 	How can we improve this workshop? 

What additional assistance, if any, will you need to be able to implement what you've learned at this training? For example, coaching support, videos, newsletters, organizational consultations, job aids, or online-based training. Please be as specific as possible.
Additional comments you would like to share:

ANNEX C

Participant Training Certificate

USAID | INDIA
FROM THE AMERICAN PEOPLE

आरोग्यं सुखसम्पदा

NATIONAL RURAL HEALTH MISSION
राष्ट्रीय ग्रामीण स्वास्थ्य मिशन

ihbp IMPROVING HEALTHY BEHAVIORS PROGRAM

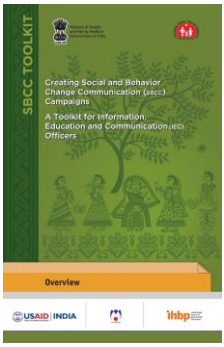
Certificate of Participation

Official recognition to have completed the
Social Behavior Change Communication Training on

_____

_____ _____

Overview



The Family Health International (FHI 360)-managed Behavior Change Communication – Improving Healthy Behaviors Program (IHBP) in India project is a United States Agency for International Development (USAID)/India-funded program. IHBP aims to improve adoption of positive healthy behaviors through institutional and human resource capacity building of national and state institutions and through development of strong, evidence-based social and behavior change communication (SBCC) programs for government counterparts.

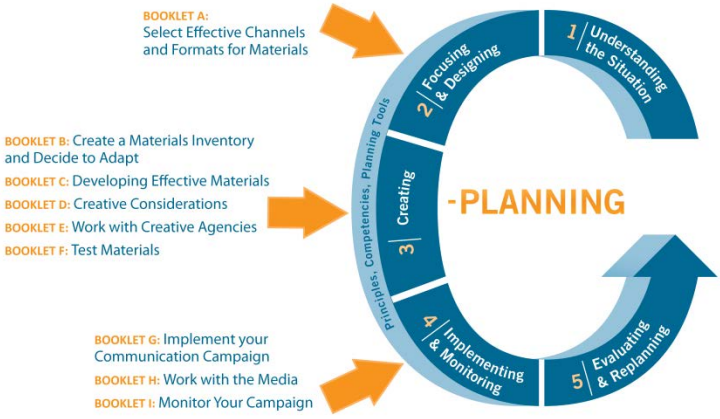
This toolkit was designed for Information, Education, and Communication (IEC) Officers who oversee the development and implementation of SBCC campaigns. It complements the SBCC curriculum developed by IHBP for a training of IEC Officers in collaboration with the National Institute of Health and Family Welfare (NIHFW).

The goal of this toolkit is to provide guidance to IEC Officers to develop and implement effective campaigns. In order to be effective, programs must follow a systematic process of developing, disseminating/implementing, and monitoring communication materials.

How to Use This Toolkit

The *Creating SBCC Campaigns: A Toolkit for Information, Education, and Communication Officers* is made up of several booklets that follow the C-Planning steps for SBCC programs. The creative work starts in C-Planning Step 2: Focusing & Designing where appropriate channels and materials formats are selected that fit in an overall communication strategy. Campaign materials are developed, tested, and produced in Step 3: Creating. Finally, IEC Officers disseminate, use, and monitor their programs in Step 4: Implementing & Monitoring.

The graphic below shows the steps, which are reflected in each booklet of the *Creating SBCC Campaigns: A Toolkit for Information, Education, and Communication Officers.*



SOURCE: Adapted from: Health Communication Partnership, CCP at JHU (2003) the P-Process; McKee et al (2000) the ACADA Model; Parker, Dalrymple, and Durden (1998) the Integrated Strategy Wheel; Roberts et al (1995) the Tool Box for Building Health Communication Capacity; and National Cancer Institute (1989) Health Communication Program Cycle.

The toolkit is divided into separate booklets to allow IEC Officers to have a handy reference guide. Each booklet of the toolkit provides guidelines, tips, examples, and tools such as worksheets and checklists as they navigate the steps of C-Planning.

C-Planning Step 2: Focusing & Designing

Booklet A: Select Effective Channels and Formats for Materials
• Types of Communication Channels • Guidelines to Determine what Channel to Use • Audience Profile • Selecting Formats for Materials • Communication Profile – India Media Reach • Checklist – Final Review of Channel and Materials Selection

C-Planning Step 3: Creating

Booklet B: Create a Materials Inventory and Deciding to Adapt
• Conducting a Materials Inventory • Example Materials Inventory • Evaluating Materials for Adaptation • Adaptation Flowchart – Should I Adapt?
Booklet C: Develop Effective Materials
• Outline and Example of a Creative Brief 3 • The Message Brief • Key Content and Tone • Checklist – Reviewing Key Content and Tone for Materials • Creative Considerations Overview • Media Mix/Activities • Openings • Checklist – Final Review of the Creative Brief

Booklet D: Creative Considerations
• Writing Text for Print Materials • Selecting Visuals for Print Materials • Design and Layout of Materials • Guidelines for Specific Print Materials • Guidelines for Developing Websites and Social Media • Tips and Guidelines for Developing Radio and Television • Developing Mid-Media • Timing of Materials Development • Checklist – Reviewing Creative Considerations
Booklet E: Work with Creative Agencies
• Work with a Creative Agencies • Understanding and Identifying Potential Creative Agencies • Selecting and Hiring an Agency • Establishing Roles and Responsibilities • Checklist – Final Check for Hiring and Working with a Creative Agency
Booklet F: Test Materials
• Limitations and Benefits of Testing • Concept Testing • Pretesting • How to Organize a Test • How Should Results from Testing Be Used? • Testing Costs and Reducing the Cost of Testing • Conducting Stakeholder Reviews • Checklist – Final Review for Testing Materials • Appendix A: Sample Question Guide • Appendix B: Sample Testing Questions for Specific Materials

C-Planning Step 4: Implementing & Monitoring

Booklet G: Implement your Communication Campaign
• Final Production and Duplication of Materials • Checklist – Production of Quality Materials • Specific Health Days in India • Training • Checklist – Planning Trainings • Where Will your Materials be Used? • Implementing Mid-Media Activities • Supervision and Support • Checklist – Final Review for Implementation
Booklet H: Work with the Media
• Understand the Media Environment • Develop a Media Plan • Engage the Media • Example Press Release • What to Do After Sending Out a Press Release or Media Advisory • Evaluate Media Engagement • Checklist – Final Review for Working with the Media
Booklet I: Monitor your Campaign
• Monitoring your Materials • What are your Monitoring Questions? • Developing Process Indicators and Tools to Monitor • Template – Sample Materials Distribution Monitoring List • Template – Community Outreach Data Form • Template – Sample Monitoring Questionnaire • Template – Sample Radio Monitoring Sheet • Excerpt Survey from Recall Study of Mass Media Campaigns for Maternal Health and Family Planning in Uttarakhand State, India

Before Using this Toolkit

The *Creating SBCC Campaigns: A Toolkit for Information, Education, and Communication Officers* follows the C-Planning Model for SBCC programs.

Before using this toolkit, IEC Officers should make sure that their program has a communication strategy. A communication strategy is a document that presents an overarching approach and direction to designing activities, materials, and products so that all these elements work together and support a clear vision of change.

If you do not have a strategy, spend some time gathering the information needed for Part A of the creative brief is shown below.

Part A of Creative Brief. Goal, Audience, and Communication Objectives (from Communication Strategy)
Goal: What are you trying to achieve?
Selected Audiences • *Primary: People most affected by the problem* • *Secondary:* People who directly influence the primary audience, either positively or negatively • *Tertiary:* People who indirectly influence the primary and secondary audience
Desired Changes What changes do you want the audience to make (e.g., what do you want them to know, feel confident about, discuss, learn skills for, or do)?
Communication Objective Addresses the key barriers (why people are not doing what they should be doing) to the desired change (what changes you want the audience to make)

Cited and Adapted Resources

AED. 1996. *A Toolbox for Building Health Communication Capacity*. Washington, DC: HealthCom Project/AED.

Alive & Thrive. 2012. *Alive & Thrive Case Study: Step-by-step guide to concept testing.* www.aliveandthrive.org/research-to-action

Borysowich, Craig. 2008. "Project staffing plan checklist." http://it.toolbox.com/blogs/enterprise-solutions/project-staffing-plan-checklist-25337

Cabañero-Verzosa, Cecilia. 2003. *Strategic communication for development projects: A toolkit for task team leaders*. Washington: International Bank for Reconstruction and Development/World Bank. In Salem, Ruwaida, Jenny Bernstein, and Tara Sullivan. 2008. "Tools for behavior change communication." *INFO Reports* No. 16. INFO Project Center for Communication. Baltimore: Johns Hopkins Bloomberg School of Public Health.

CARE and ICRW. 2007. *Inner spaces outer faces initiative (ISOFI) toolkit: Tools for learning and action on gender and sexuality*. Washington, DC: CARE/International Center for Research on Women (ICRW). http://www.icrw.org/files/publications/ISOFI-Toolkit-Tools-for-learning-and-action-on-gender-and-sexuality.pdf.

C-Change (Communication for Change). 2012a. *C-Bulletins: Developing and Adapting Materials for Audiences with Lower Literacy Skills*. Washington, DC: FHI 360/C-Change.

C-Change. 2012b. *C-Modules: A Learning Package for Social and Behavior Change Communication.* Washington, DC: FHI 360/C-Change.

C-Change. 2012c. *A Guide to Working with the Media to Promote VMMC in Kenya*. Washington, DC: FHI 360/C-Change.

C-Change. 2012d. *Community Conversation Toolkit*. Washington, DC: FHI 360/C-Change.

C-Change. 2012e. *VMMC Communication Materials Adaptation Guide.* Washington, DC: FHI 360/C-Change.

Centers for Disease Control and Prevention. 2011. *The Health Communicator's Social Media Toolkit.* http://www.cdc.gov/socialmedia/Tools/guidelines/pdf/SocialMediaToolkit_BM.pdf.

Cowan, Cate and Lonna Shafritz. 2005. *Spot On Malaria: A Guide to Adapting, Creating and Producing Effective Radio Spots.* Washington, DC: CHANGE Project/ AED.

de Fossard, E., and Lande, R. January 2008. Entertainment-Education for Better Health. *INFO Reports*, No. 17. Baltimore, MD: INFO Project, Johns Hopkins Bloomberg School of Public Health.

Department of Health and Family Welfare. 2008. *Behavior Change Communication (BCC) Strategy for NRHM in Uttar Pradesh.* India: Government of Uttar Pradesh.

Domor Communication Consulting Pvt. Ltd. 2009. *Assessment of Media Reach.* Baltimore: Johns Hopkins Bloomberg School of Public Health/Center for Communications Programs. http://www.uhi-india.org.in/20may/Assessment%20of%20media%20reach%5B1%5D.pdf

Health Research for Action. n.d. *Health Communication Tips.* Berkeley, California: UC Berkeley

India Health Services. n.d. *Health Day List.* http://indianhealthservices.in/health_day_list.php. Accessed July 2013.

Kols, Adrienne. 2007. *A gender guide to reproductive health publications: Producing gender-sensitive publications for health*

professionals. Baltimore: INFO Project, Johns Hopkins Bloomberg School of Public Health.

Maximus. 2005. *Health Literacy Style Manual.* Reston, VA: Maximus.

McKee, Neill, Erma Manoncourt, Chin Saik Yoon, and Rachel Carnegie, eds. 2000. *Involving people, evolving behavior*. New York: UNICEF; Penang: Southbound.

National Cancer Institute. 2003. *Clear and simple: Developing effective print materials for low-literate readers.* Bethesda, Md.: National Institutes of Health.

National Cancer Institute. 2008. *Pink book: Making health communication programs work.* Bethesda, Md.: National Institutes of Health.

O'Sullivan, Gael, Joan Yonkler, Win Morgan, and Alice Payne Merritt. 2003. *A field guide to designing a health communication strategy*. Baltimore: Johns Hopkins Bloomberg School of Public Health/Center for Communications Programs.

Piotrow, Phyllis. 1997. *Health communication: Lessons from family planning and reproductive health*. Westport: Praeger.

Robinson, Elizabeth, Deborah Baron, Lori L. Heise, Jill Moffett, and Sarah V. Harlan. n.d. *Communications Handbook for Clinical Trials: Strategies, Tips, and Tools to Manage Controversy, Convey Your Message, and Disseminate Results.* North Carolina: Family Health International.

Rudy, S., J. Tabbutt-Henry, L. Schaefer, and P. McQuide, Fall 2003. Improving Client-Provider Interaction. *Population Reports,* Series Q, No. 1. Baltimore, MD: INFO Project/Johns Hopkins Bloomberg School of Public Health.

Salem, R.M., J. Bernstein, and T.M. Sullivan. January 2008. Tools for Behavior Change Communication. *INFO Reports*, No. 16. Baltimore, MD: INFO Project/Johns Hopkins Bloomberg School of Public Health.

Smith, Bill and John Strand. 2008. *Social Marketing Behavior: A Practical Resource for Social Change Professionals.* Washington, DC: AED.

Straight Talk Uganda. 2007. Newsletter monitoring questionnaire.

The Health Communication Unit. 2009. *Overview of Developing Health Communication Campaigns Toolkit*. Centre for Health Promotion, University of Toronto.

U.S. Agency for International Development. 2012. *Health Communication: Enabling Voluntary and Informed Decision-making.* Washington, DC: USAID.

U.S. Department of Health and Human Services. 2009. *Simply put: A guide for creating easy-to-understand mateirals*. Washington, DC: Office of Disease Prevention and Health Promotion

U.S. Department of Health and Human Services. 2010. *Health literacy online: A guide to writing and designing easy-to-use health Web sites*. Washington, DC: Office of Disease Prevention and Health Promotion

Woodward, Joshua. 2012a. *Integrating low-cost video into agricultural development projects: A toolkit for practitioners.* Washington, DC: FHI 360/Facet Project.

Woodward, Joshua. 2012b. *Interactive radio for agricultural development projects: A toolkit for practitioners.* Washington, DC: FHI 360/Facet Project.

Younger, Elizabeth, Scott Wittet, Carol Hooks, and Heidi Lasher. 2001. *Immunization and child health materials development guide.* Washington, DC: PATH and Bill and Melinda Gates Children's Vaccine Program.

Booklet A: Select Effective Channels and Formats for Materials

"What communication channel do we use?" is a rather outdated question in SBCC. Ideally, different channels send mutually reinforcing messages to reach target audiences in different ways.

It might be helpful to think of communication channels in terms of three basic intervention types: interpersonal, mid-media, and mass and social media as shown in the graphic below.

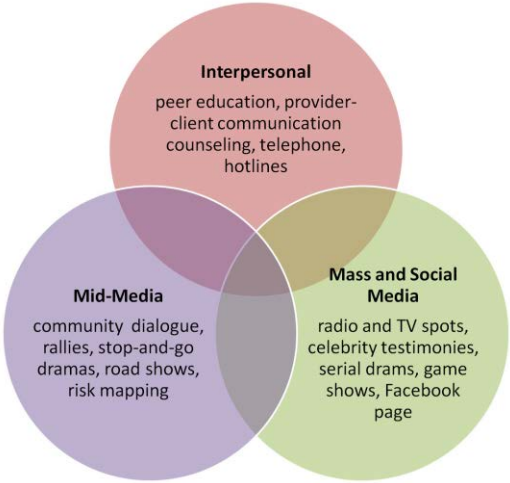


Figure 1: Types of Channels

Contents

Types of Communication Channels

Channel Type: Interpersonal

Examples Activities and Materials	
Activities: one-to-one communication, such as provider to client, peer to peer, training and skills-building in small groups	*Materials:* flip charts, counseling cards, training curricula, discussion cubes, role play cards
Potential Benefits	**Cost and Effort Estimates**
• Tailored communication • Interactive • Allows for greater intensity • Able to unpack complex information • Provides personalized assistance • Can build behavioral skills • Increases self-efficacy	Though interpersonal communication activities are not expensive, they are not one-off investments. They need to be continuously supported with supervision and incentives to maintain the quality of the intervention.

Figure 2: Example of IPC Channel

Channel Type: Mid-Media

Examples Activities and Materials	
Activities: community meetings, parent–teacher meetings, drama, cultural events	*Materials:* bulletin boards, temple and mosque leaflets, posters, scripts for drama
Potential Benefits	**Cost and Effort Estimates**
• Can stimulate community dialogue • Can motivate collective solutions • Can increase intentions to act • Can provide feedback to broader community • Can reinforce and extend IPC activities • Can spread new ideas through social networks	Mid-media activities do not have to be expensive, especially if the project has community ownership and taps into existing resources and strengths. However, these types of activities need to be well-planned, monitored, and possibly linked with other channels for effectiveness.

Channel Type: Mass and Social Media

Examples Activities and Materials	
Activities: television or radio shows/spots	*Materials:* scripts, billboards, transit advertising, websites, Facebook, blogs, YouTube, SMS
Potential Benefits	**Cost and Effort Estimates**
• Extensive reach • Efficient and consistent repetition of message • Have potential to mobilize youth effectively (social media) • Can reinforce and extend IPC activities	Mass media are expensive, but their wide reach often makes the cost per person minimal. Social media may involve minimal costs, but access and privacy issues must be considered.

Guidelines to Determine what Channel to Use

As you determine which communication channels are appropriate to best reach your audience, keep the following in mind.

Complexity of the Issue

- There is no one "super-medium" or channel that can do all things.
- Using a combination of channels that are linked and mutually supportive is more effective.
- All materials should be recognizable as originating from the program and tied together by a logo/tagline and a uniform design identity.
- Passive audiences learn little. Engage the audience through your materials and media.
- Channels should not be considered separately from the overall program design.
    - Integrate selected channels with other program activities and service delivery.
    - For example, do not begin a communication campaign promoting the services of skilled birth attendants until ANMs have been trained as SBAs and the services are available.

Program's Desired Reach

- Programs that aim at national or regional coverage often use mass media.
- Media can reinforce and extend face-to-face communication, but cannot replace it.
- Make sure mass media exposure is repeated enough times for the audience to hear the message, understand it, and try it. Ensure sufficient repetition of the campaign but do not overplay spots or shows to avoid audience fatigue.

Prevailing Social Norms and Sensitivity about the Issue Being Addressed

- Various target audiences have different openness and willingness to address certain issues such as sex and family planning. Consider socio-economic category, education, gender, age, and so on.
- Mass media may not be ideal for highly sensitive issues; consider interpersonal channels.

Media Habits and Preferences of Target Audiences

- Tailor programming to the audience's preferred listening times, and favorite stations, programs, and media.

Budget for Communication Campaign

- The cost of communication channels varies by type.
- Remember, less is more—that is to say, quality pays off in communication. It is better to do one thing well than to have many different activities that people don't remember because they were poorly implemented.
- Channel selection is important, but budgeting for production quality determines success.

Selecting Channels for your Audience – An Audience Profile

An audience profile may help create a personal sense of the people to be reached through your SBCC efforts. It will help you identify what channels they may prefer, be exposed to, and/or use.

The profile may describe the person's:

- geographic location
- gender
- age
- occupation
- literacy level
- lifestyle
- where she or he gets information
- how he or she reacts to the health or development issue you are focusing on
- things he or she cares about or enjoys

When conducting a profile, **try to base these descriptions on data—not assumptions.** Below is an example audience profile.

Meet Rajni. She is a 22-year-old married woman from the rural countryside and lives in a small village close to _____. She is happily expecting her first baby, though she admits to her younger sister that she is scared about delivering the baby. She is 6 months pregnant. She recently attended a program with other women in her village on nutrition and pregnancy. She recently learned that it is important for her and her growing fetus to take an iron supplement every day. She knows that the fetus is growing because she feels hungry and tired most of the time. She wants to do what is right for her baby, but both her mother-in-law and her older sister told her that the iron supplement was not necessary. She doesn't know what to think about who knows best.

Details and data taken from: Situational Analysis on Maternal Health Care in India: Special focus on EAG states and Assam, IHBP and USAID/India.

Selecting Formats for Materials

After determining what communication channels your program will use, you then need to decide the format of the materials as your next step. Below is a list of common materials formats and some advantages and disadvantages related to them.

Types of Formats for Materials

Print Materials: Reminder or Referral Print Materials *Examples: posters, leaflets, brochures with quizzes, buttons, stickers*	
Advantages	**Disadvantages**
• Use as reminder of campaign, key facts, actions • Can refer someone further to services/resources • Can be wide reaching • Chance to read, keep, and share material • Can have more detailed information and can be used to provide instructions or explain new information (brochures and pamphlets)	• Shares limited amount of information (posters, leaflets, and small print materials) • Requires a level of literacy • Audience views materials independently • May not be kept or valued by the audience • May not be appropriate for sensitive topics that require confidentiality

Figure 3: Front page of informational leaflet on IUCD

In-Depth Print Materials for IPC and Trainings *Examples: training manuals that include role plays and checklists, flip charts, dialogue guides for meetings or counseling sessions, comic books, manuals for telephone hotline counselling*	
Advantages	**Disadvantages**
• Can explain new information more in depth • Chance to read, keep, and share the material • Can guide others in communicating with the audience (e.g., peer educators, ASHAs, ANMs) by serving as a job aid	• Requires audience's attention for longer periods of time • Requires a certain literacy level if distributed directly to audience • Requires time and training if the material is to be used as a job aid in communicating verbally with the target audience

Social Media/New Media: SMS	
Advantages	**Disadvantages**
• Growing reach • Low cost • Good for reminders and tips	• Limited number of characters • Limited audience engagement • Discrepancies in phone access • Privacy considerations

Social Media/New Media: Websites *Examples: Facebook, Twitter, blogs, RSS feeds*	
Advantages	**Disadvantages**
• Rapidly able to update or disseminate information • Engage audience to participate, exchange, and share • Good to reach urban youth	• Level of literacy needed • Audience needs to seek out information • Limited access among most audiences

Social Media/New Media *Examples:* YouTube Videos	
Advantages	**Disadvantages**
• Cheap to distribute • May reach a wider audience • Visual and audio make emotional appeals possible • Easier to demonstrate a behavior • Does not require literacy	• Mostly a passive consumption • Less than full attention likely • Discrepancies in access • Can only share limited amount of information • May not be appropriate for sensitive topics requiring confidentiality or a narrow niche audience

Mid-Media: Interactive Group Activities *Examples: guides for discussion groups, agenda and support materials for community meetings*	
Advantages	**Disadvantages**
• Able to discuss sensitive issues • Can respond immediately to the individual/group • May have more credibility • Can motivate, influence, and support	• Requires specific training • Can be expensive initially and/or costly to scale up • Low reach and frequency • Difficult for intended audience to keep or pass on material • Difficult to keep messages consistent

Mid-Media: Outreach Activities *Examples: community, village to village, household, peer to peer, storytelling, songs*	
• Able to discuss sensitive issues • Can be more credible because it is face-to-face • Can respond immediately to the individual/group	• Requires specific training and support materials • Can be expensive initially and/or costly to scale up • Low reach and frequency • Difficult to keep messages consistent

Mid-Media: Live Performances *Examples: scripts for street and stop and go theater, guides for talent shows*	
• Can be entertaining • Able to discuss sensitive issues • May appeal to wider audience • May be culturally appropriate	• Requires specific training • Can be expensive initially and/or costly to scale up • Low reach and frequency • Important to balance entertainment and messaging • Difficult to keep messages consistent

Mass Media: Billboards	
Advantages	**Disadvantages**
• Can reach target audience • Can reinforce IPC • Use as reminder of campaign, key facts, desired actions • Can refer someone further to services/resources • Can be wide reaching	• Shares limited amount of information • Requires a level of literacy • Audience views independently and quickly on the way to somewhere • May not be appropriate for sensitive topics that require confidentiality

Figure 4: Billboard for IHBP Family Planning Campaign

Mass Media: Radio *Examples: public service announcements, commercials, talk and call-in shows*	
• Various formats • Opportunity for direct audience involvement via call-in shows • May reach a wider audience • Comes into homes • Does not require literacy	• Mostly a passive consumption • Less than full attention likely • Feature placement requires contacts • NGOs compete for air time

Mass Media: TV/Video *Examples: PSAs, talk and call-in shows (ask-the-expert shows), diaries (reality programming), serial dramas, variety shows, cartoons, music videos*	
• May reach a wider audience • Visual as well as audio make emotional appeals possible • Easier to demonstrate a behavior • Comes into homes • Does not require literacy	• Mostly a passive consumption • Less than full attention likely • Expensive to produce and distribute • Discrepancies in access • Can only share limited amount of information • May not be appropriate for sensitive topics requiring confidentiality or a narrow niche audience

Mass Media: Newspapers, Newsletters, Magazines	
• Reach broad audiences rapidly • Can convey health news and breakthroughs more thoroughly than TV or radio • Easy audience access to in-depth issue coverage is possible	• Short life limits for re-reading, sharing with others • Level of literacy required

Communication Profile – India Media Reach

Before deciding what channels to select, it's important to consider where your audience is.

- Where are they throughout the day?
- What channels can reach them? For example, in rural areas, television might not be the best communication channel if there are no stations or people cannot afford cable. Or, if your target audience is men, reaching them during the day at the home may not be the best choice.

To determine this, some formative research around your audience's daily activities and media habits may be useful. In order to get updated data on media reach, refer to The Indian Readership Survey.

The IRS is one of the largest research studies carried out in India. With a sample size of over 200,000 individuals across urban and rural India, it provides comprehensive reporting at a national, state, and city levels. It provides data (annually/half yearly) on access to media and media consumption across all mass media, i.e., television, print, radio, cinema, and Internet.

Television Audience Measurement (TAM): TAM reports viewership at a national, state, and town-class levels. TAM is a metric for assessing the popularity of various television channels and programs and is the accepted industry standard for selection and evaluation of TV plans.

Checklist – Final Review of Channel and Material Selection

As a final step, before moving on, review your final channel and materials format selection using the checklist below.

Channel Selection

- ☐ The channels selected support each other and are linked.
- ☐ The channels selected are suitable for achieving the communication objectives.
- ☐ The channels can be produced within time constraints.
- ☐ The channels selected are appropriate for the intended audiences.
- ☐ The channels selected are an efficient use of resources.

Material Format Selection

- ☐ The materials formats support key activities and channel selection.
- ☐ The materials formats reflect audience preferences.
- ☐ The materials formats can be produced within available budget and time constraints.
- ☐ Interactive materials formats were considered.

Booklet B: Creating a Materials Inventory and Deciding to Adapt

When starting to develop materials, ask yourself, **what already exists?**

Using and adapting previously developed materials may be more cost effective than to develop new ones. Find out whether campaigns, materials, and activities for audiences with similar characteristics, such as age, gender, socioeconomic status, and lifestyle, have already been developed and can be adapted for use with your audience.

Or, in many cases you may have received campaign materials and media from the central government to disseminate. If this is the case, careful review and adaptation in terms of culture, language, and perhaps format is essential. This involves more than just translating them into the local language or changing the artwork. Even when adapting materials you should still develop a creative brief, conduct testing with the intended audience, and have stakeholders review them.

Contents

Conducting a Materials Inventory

While conducting an inventory of materials, review what communication activities are currently taking place within the community. Think about:

1. What communication campaign, materials, or activities are happening in the health field or in the same geographic area (within the organization and outside organizations)?
2. Are they effective? Do they work with the same audiences?
3. Can we link to or complement these programs?

Template for Materials Inventory

Once you have decided what materials you need, use this template to organize your materials inventory. Based on your materials needs, in the second column list materials that were developed in the past—your materials inventory. Once you have conducted an inventory of what exists, consider if they can be adapted using the Adaptation Flowchart on page 10.

	Materials Needed	**Materials Developed in the Past**	**Ways to Complement or Adapt Materials Already Developed**
Interpersonal (e.g., counselling cards, flip chart)			
Mid-media (e.g., scripts)			
Mass media or social media (radio programs, blogs)			

Evaluating Materials for Adaptation

Adapting materials is similar in many ways to developing the original resource, though somewhat abbreviated in the concept and materials development stage. For example, the technical content may require a few changes, and the adaptation may be able to take advantage of creative concepts and formats that have proved successful elsewhere. There may still be a need, however, to adjust the material or product for a different culture or context, including messages, visuals, and language.

Determining if the Material is Appropriate to Adapt

During the materials inventory, if you come across material you might want to adapt, use these guidelines below to determine if it is appropriate for your needs.

Adaptation Consideration	Questions to Determine Whether to Adapt Materials and Activities
Communication Objectives	• Do the concepts and messages help meet program objectives? • Do the concepts and messages address barriers to behavior change for the intended audience?
Culturally Appropriate	• Are the materials developed for a similar cultural context or country? • Are they developed for similar target audiences? • Are the materials appropriate and are culturally specific values and beliefs represented in the content and visuals?
Intended Audience	• Is this one of their preferred communication sources and formats? • Does this material match their literacy levels? • Did the original audience for which this material was developed consider this material compelling (motivating and engaging)?
Technical	• Is the information in the material accurate? • Is the information current?

Adaptation Consideration	Questions to Determine Whether to Adapt Materials and Activities
Words (written and spoken): texts, narratives, captions	• Are the text, narrative, and caption accurate? • Is the amount of information appropriate and presented in a logical order? • Does the text address barriers to change for the intended audience? • Are the culture-specific statements and local idioms in the preferred language of the audience and at appropriate reading levels? • Do the texts complement or compete with visuals used? • Are the messages and the sources of the messages (for example, narrators) relevant, credible, and attractive to the audience?
Visuals: photographs, cartoons, drawings, images, graphics	• Do the visuals used illustrate important points, are understood, and will not confuse the audience? • Do the people and places seen in the visuals represent the audience and their culture realistically and will they be familiar and acceptable to them?
Formats: style, size, and type of material or sequence of events	• Are the print, audio, or audio-visual formats likely to be effective in reaching the audience? • Is the design of the material inviting, visually appealing, and easy to follow, including fonts, typefaces, and colors used? • Is the size and format of printed materials appropriate and convenient for their intended use (often field tests are required to determine this)?

Obtaining Permission to Adapt

Although a number of SBCC materials can be freely adapted in different settings, verify whether copyright requirements have been imposed by the organizations that produced them or by the creative agencies they hired.

It is never a mistake to contact the organizations identified on the material or product and ask for permission to adapt it. However, if it was produced with USAID funding, the contents are usually public property and copyrights cannot be imposed, even if the creator was an advertising agency. Therefore, if the material is in the public domain, permission to adapt is not needed. **You will still need to ask for an open file of the artwork and the citation.**

For all adaptations, it is common practice to acknowledge intellectual property, i.e., the efforts of those who created the original material or product. This is done by including a full citation that includes the original title and the name of the producer.

Note on Translation

If the decision has been made to translate written material, it is important to hire professional translators who:

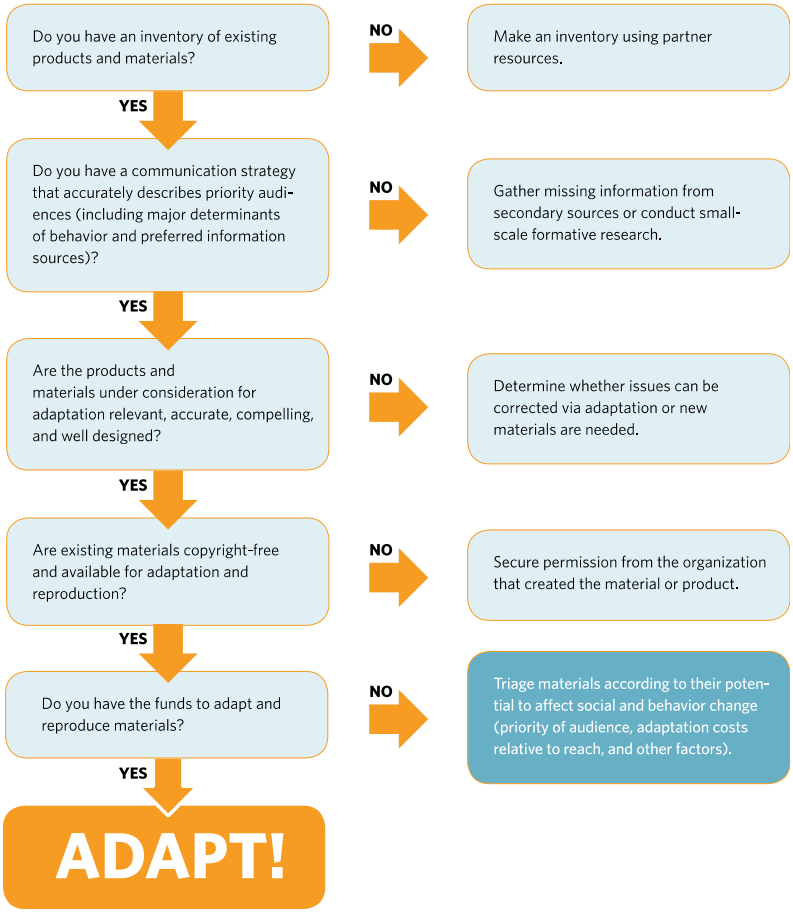
- are able to write well in their native language
- have the necessary cultural knowledge
- can translate for meaning (instead of a literal translation, i.e., word for word)
- are experienced in writing for lower literacy audiences, if appropriate

Challenges to Overcome When Adapting SBCC Materials

Challenge	Solution
Faulty and ineffective content may be carried over into a new region or program.	Before deciding to adapt a material or activity, get feedback on its effectiveness from the program that produced it and review evaluation data if they exist.
Insufficient time and money are allocated because the choice to adapt was driven by the need to spend as little as possible.	Create an initial budget and timeline based on the cost of creating a new material or activity, and then eliminate extraneous items.

Adaptation Flowchart – Should I Adapt?

ADAPTATION FLOWCHART



Booklet C: Developing Effective Materials

Before diving into the actual materials development, develop a creative brief. A creative brief is a short (one- or two-page) tool to guide the development of SBCC activities and materials.

Creative briefs give those developing materials everything they need in one place. They are also used to help create consensus among the SBCC team and stakeholders on the activity or material being developed.

There are often five broad categories to a creative brief:

A. Goal and selected audience(s) for the activity or material(s)
B. Desired changes, barriers, and communication objectives
C. Message brief
D. Key content and tone
E. Media mix and other creative considerations

Contents

What Is a Creative Brief?

A single creative brief can be developed for a set of materials or activities, but only if all of them share communication objectives and are designed for the same audience (or audiences).

The creative brief usually flows from a communication strategy and addresses each material or activity named in the strategy. If you do not have a communication strategy, develop Part A: Goal, Audience, and Communication Objectives[1] of the creative brief to start conceptualizing your campaign.

Outline of Creative Brief

A. Goal, Audience, and Communication Objectives (from Communication Strategy)
Goal: What are you trying to achieve?
Selected Audiences: Who is this material intended for?
Desired Changes What changes do you want the audience to make (e.g., what do you want them to know, feel confident about, discuss, learn skills for, or do)?
Communication Objective The objective addresses the key barrier to the desired change. *Example: After the next health fair, there will be an increase in the number of _____ (audience) who _____.*

[1] This section of the Toolkit does not go into Part A of the creative brief, but focuses on Parts B–D.

B. Message Brief: Formulated from an audience's point of view, it guides writers, designers, and producers in designing and developing messages.

The Key Promise

The key promise provides a compelling, truthful, and relevant benefit that the audience receives by taking the desired action.

Example: If you attend all your ANC appointments and deliver at a health facility you are more likely to have a healthy baby.

The Support Statement

- The support statement convinces the audience they will actually experience the benefit.
- It details reasons why the key promise outweighs key barriers.
- This is sometimes referred to as the aspirations of the audience. Who do they want to be?
- This often becomes the message.

Example: Because we all play a part in ensuring our baby's health.

Call to Action

The call to action tells your audience what you want them to do or where to go to obtain the new product.

Example: Deliver in a health facility and stay 48 hours for a safe delivery and a healthy baby.

C. Key Content and Tone: Expands upon the message brief and provides more detail.
Key Content What is relevant to your audience to achieve the communication objective to bring about change? This may be bullet points, grouped in the order they should appear in the material.
Tone or Appeal These help convey the key promise. What feeling or personality should your communication have, based on your key promise (e.g., humorous, logical, emotional, positive, or comic)?

D. Creative Considerations: Describes how this activity or material relates to others you are creating and anything else you feel is important to keep in mind.
Media Mix/Activities These are details on the campaign or series of activities to which this activity or material contributes.

Openings, Creative Considerations, Cost and Timing
 	
• *Openings:* What opportunities exist for reaching the audiences (e.g., market day, health fairs, in school programs)?
• *Creative considerations:* Is there anything else the creative people need to know?
  ○ language
  ○ style and illustration type
  ○ reading levels of your audiences
  ○ guidance regarding style, layout, or visuals
  ○ logos need to be used and other branding
• *Cost and timing*: How much will the activities or materials cost, and when do they need to be ready? Do you have adequate funds to create everything?

Example Creative Brief – Family Planning Campaign for Husbands

A. Goal, Audience, and Communication Objectives
Goal: To garner spousal support and participation for birth spacing
Selected Audiences • **Primary Audience:** husbands (who are unsterilized) of currently married unsterilized women in the age group of 15–29 years, living in rural, urban, and semi-urban areas • **Secondary Audience (own creative brief):** mothers-in-law/family members/peers (those in direct regular contact with couples); ASHA, ANM, Block Extension Educators (BEEs) • **Tertiary Audience (own creative brief):** religious leaders/other community influentials and media
Desired Changes • Married men will know the health benefits of spacing childbirths three years apart. • Married men will support their wives in using a modern spacing method.
Communication Objective: • By the end of the campaign there will be an increase in the number of married men who believe spacing at least 3 years between childbirths ensures better health of their family. • By the end of the campaign there will be an increase in the number of married men who report having used a modern spacing method.

B. Message Brief
The Key Promise Smart and caring family men space at least 3 years between successive births. Start using a spacing method today.
The Support Statement Because you are a smart and caring family man.
Call to Action Talk to your health care workers about modern spacing options.

C. Key Content and Tone
Key Content The communication campaign will address barriers, myths, and misconceptions associated with successive childbirth, modern spacing methods, and other known barriers listed in the project's communication strategy.
Tone or Appeal The campaign will be informative and motivating and will appeal to husbands' desire for healthy babies and mothers.

B. Message Brief

What are Key Messages? The Message Brief

- Consist of the essential themes that should be included through all communication channels
- Messages in rough form and represent ways of presenting the information to the intended audiences
- Are used by creative agencies to craft final messages
- Ensure consistency and relevance of messages in materials
- Contribute to the overall effectiveness of the communication strategy by ensuring that, for example, the service provider, the community mobilizer, and the actor featured in a radio announcement all reinforce the same key message points

TIP: *Key messages should not only be facts and information. Remember what you want your audience to do. How will your messages overcome the barriers to the desired change?*

When developing key messages, consider:

- What is the desired change?
- What are the barriers?
- What are the communication objectives?
- What do the key promise and support statement say?
- What are the important themes?
- What are the most important points or information?

Crafting Final Messages

After developing the key messages, it is time to translate them into the crafted message—words or images that the audience will find memorable and compelling. Use the Seven Cs of Communication in the checklist below to review the messages.

The Seven Cs of Communication
1. Command attention ☐ The message stands out to your audience. ☐ The message is believable.
2. Clarify the message ☐ The message is simple and direct. It is focused only on what the audience needs to know. ☐ The strongest points are given at the beginning of the message.
3. Communicate a benefit ☐ The message clearly states what the audience gets in return for taking action. ☐ The message conveys that the benefit outweighs the barriers.
4. Consistency counts ☐ Key messages are used appropriately and ensure consistency and support for all the program's materials.
5. Cater to the heart and the head ☐ The message uses an appropriate tone for the audience. ☐ The appeal is appropriate as laid out in the creative brief.
6. Create trust ☐ The information comes from a credible source.
7. Call to action ☐ The call to action clearly states what the audience should do after seeing the communication. ☐ The call to action is realistic.

C. Key Content and Tone

There is no reason why IEC Officers should avoid written text even for audiences with lower literacy. Lower literacy readers can and do engage with text.

Literacy is important, especially for print materials. Below is a table that describes the differences between skilled readers and lower literacy readers.

Differences Between Skilled Readers and Lower Literacy Readers	
Skilled Readers	**Lower Literacy Readers**
Read with fluency	Read slowly
Understand meaning of words in context of text	May miss meaning of words in context of text
Able to determine meaning of unfamiliar words	May skip unfamiliar words
Do not need illustrations to understand meaning	Understand meaning better when photographic and graphic elements are included
Can understand abstract images against a monochrome background	Have difficulty understanding abstract images
Can read text presented in wide range of typographic styles	Can be distracted by wide range of typographic styles
Are comfortable reading long text	Are uncomfortable reading long text
Are able to easily produce text themselves	Have difficulty producing text themselves
Access text in multiple media formats, including digital content	Access text in limited media formats and may have less access to digital content

Developing Material Content

When developing the content for the materials, consider the following:

Present only a few ideas	• Too many ideas and messages in one material may not be remembered. • Concentrate on what is the most important idea to convey.
Present information that is directly relevant	• Do not include a large number of facts. • Concentrate on those most pertinent facts—the key messages.
Consider what is most important to the audience	• Put yourself in the audience's place. Think about the most important information and present it first. • Use examples that are appropriate for age, gender, and culture.
Present content in an order that makes sense to the audience	• Present the main points first and last. • Information at the beginning and end is most likely to be remembered.
Consider how to make content interactive	• Develop checklists, quizzes, scratch-offs, or introduce "interactive" narrators for storytelling. • You can also ask the audience to do something or consider consequences.
Address the reader directly	• Use relevant examples from the audience's experiences.
Involve the audience	• This will ensure that the documents are interesting, interactive, and demographically appropriate. More information in the testing section.

Considerations for audio content (video and radio)	• Consider what format your radio/audio spot will use since this will influence the length and amount of content. ○ 60 seconds is a good length for a new message, and 15–30 seconds is a good length as a reminder. • Use only a few characters to tell the story.
Considerations for video content	• Consider what format your spot will use since this will influence the length and amount of content. ○ Consider the “10-minute rule” claiming that most people tend to lose their attention after 10 minutes. • Detail out how the content will go in your storyboard. • It is important that your video has a clear beginning, middle, and end. • Use only a few characters to tell the story.
Considerations for mid-media	• Mid-media support and reinforce other communication pieces. • Ensure that messages are clear. • Ensure they engage the audience and entertain where possible.

Determining an Appropriate Tone for Materials

Determining the tone of the message is important since content can be presented in different ways. IEC Officers need to use their judgment, know their audiences, and reflect on their communication objectives. Ensure your tone is appropriate for your audiences.

Considerations for Tone	
Factual appeals	• Facts tend to work well with policy and decision makers. • Not just any fact will work; select what information is important to the audience—cost effectiveness? General good?
Emotional appeals	• Emotional appeals work well when presenting positive benefits of an action and when audience members are already in favor of an idea or practice. • For people who are more indifferent toward a topic, messages should combine a benefit with major drawbacks of not adopting the recommended action.
Humorous appeals	• Humor works better for simple messages and has the ability to stand out. • If humor is not appropriate for conveying the main message, the joke tends to be remembered, rather than the message. • Humorous messages may become irritating if repeated too often.

Considerations for Tone	
Threat or fear appeals	• Threat or fear tends to be most effective with people who seek out risks or are coping with a situation, rather than those anxious about it. • Exposure should be voluntary, such as by picking up a brochure. • In general, however, the effectiveness of threat appeals is widely debated and even if they work in the short term, they may not work for sustaining a behavior.

TIP: *Develop the material in a tone that will appeal to your audience. In some cultures, the use of "you" and "your" tends to make materials more personal and engage audiences.*

Checklist – Reviewing Key Content and Tone for Materials

This checklist can help IEC Officers gauge whether audiences will understand, accept, and respond to proposed messages and materials.

Effective Messages

- ☐ Experts reviewed program messages.
- ☐ Messages are simple and concise.
- ☐ Messages state explicitly the action that audiences should take.
- ☐ Visual aids reinforce messages.
- ☐ Messages reinforce each other.
- ☐ Messages stand out and draw the audience's attention.
- ☐ Messages are action-oriented.
- ☐ Messages help overcome barriers and facilitate behaviors promoted.

Informative and Effective Content

- ☐ Content presents only a few ideas.
- ☐ Content presents the most important information.
- ☐ Content connects to the audience
- ☐ Active voice is used.
- ☐ Written/visual/audio content is easy to follow.

Tone

- ☐ Tone is appropriate for audience.
- ☐ Tone is culturally appropriate.
- ☐ Tone is consistent throughout the material.
- ☐ Tone of messages is appropriate to the audience's preferences.

D. Creative Considerations

In this part of the creative brief, it is important to think and detail how you envision the final materials. These are creative considerations for the different types of materials. Although each material is unique, IEC Officers have developed best practices for certain formats. See Booklet D for more detail on creative considerations.

Booklet D reviews creative considerations for:

- print materials (including websites)[2]—details on text, visuals, layout, and considerations for specific materials
- radio, television, and other visual/audio mass media—additional considerations, and guides for reviewing scripts
- mid-media and community-based materials and activities—additional considerations

[2] Print materials include interpersonal materials, such as brochures, and mass media, such as billboards and websites. Although we have classified channels into interpersonal, community/mid-media, and mass and social media, material formats do not fit neatly into each of these categories. Instead this section organizes materials into print, visual/audio, and community-based activities (interactive).

Media Mix/Activities

This section is where you describe how the material contributes to or fits into the campaign or a particular program activity. When developing this section consider the questions below.

Thinking about the Media Mix	
How does this material fit with other materials developed?	• Consider what other materials are being developed by the program. • Ensure the material fits (look and feel, key messages, audience) within a larger campaign or program. • Review your communication objectives and ensure that it supports them.
How will this material be used?	• Since many materials are not stand-alone, ensure activities support the use of the material. • Flip charts and user-guided materials may be part of peer education, counselling, or dialogue activities. • Reminder materials can reinforce information and motivate change.

Openings

In the openings section of the creative brief, think about existing opportunities to implement, display, or place your materials. Take advantage of existing activities to reach your audience. This may be where you consider placement of your materials. Go back to the communication profile in Focusing & Designing to see how to reach your audience.

When developing this section consider the questions below.

Thinking about the Openings	
What are existing events and activities can support you?	• Think of regular events, e.g., World AIDS Day, market days, where you can use your materials. • Consider linking up with an organization that holds regular events such as health fairs.

Checklist – Final Review of the Creative Brief

- ☐ Addressed one audience and/or one material
- ☐ Provided a clear definition of the goal, intended audience or audiences, and communication objectives of the SBCC activity or material
- ☐ Explained the desired change and barriers to change
- ☐ Used literacy levels for materials appropriate to the audience
- ☐ Described key content, tone, and the message brief
- ☐ Clearly described materials for the material developers to understand what is needed
- ☐ Adhered to creative considerations
- ☐ Took advantage of opportunities to interact with and engage the audience
- ☐ Described the format of the SBCC materials and activities and outlined dissemination opportunities

Booklet D: Creative Considerations

Although each material is unique, IEC Officers have developed best practices for certain formats. This toolkit will review creative considerations for

- print materials (including websites)[1]—details on text, visuals, layout, and considerations for specific materials
- radio, television, and other visual/audio mass media—additional considerations, and guides for reviewing scripts
- mid-media and community-based materials and activities—additional considerations

This section of the toolkit will provide details on what to include in the creative brief, guidance on developing materials (if you are doing it yourself), or to how to review materials received from the creative agency.

[1] Print materials include interpersonal materials, such as brochures, and mass media such as billboards and websites. Although we have classified channels into interpersonal, community/mid-media, and mass and social media, material formats do not fit neatly into each of these categories. Instead this section organizes materials into print, visual/audio, and community-based activities (interactive).

Contents

Writing Text for Print Materials

Although there is no discrete set of rules for writing in plain language, some general guidelines are below.

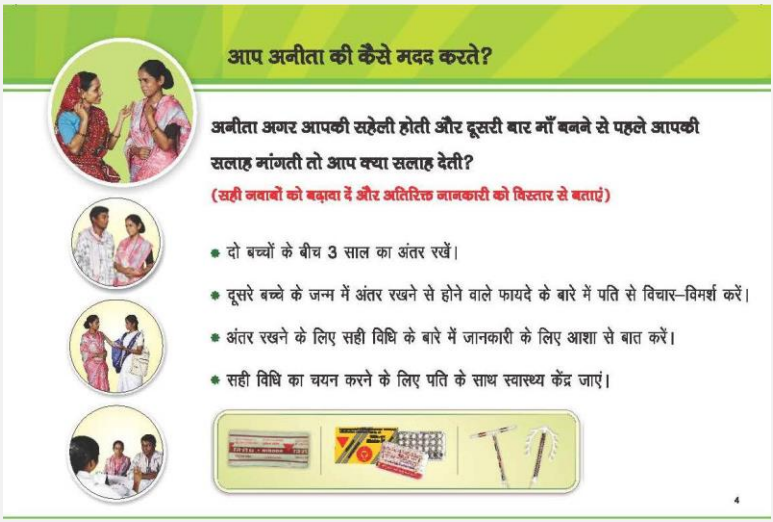
Guidelines for Writing Text	
Use simple vocabulary or plain language	• Limit abbreviations and acronyms. • Limit the use of colloquialisms and jargon. • Limit the use of scientific, legal, and bureaucratic language. If you need to, define new words and concepts in simple language. Clarify with concrete examples. • Omit words that do not add meaning. • Count the syllables in the words. The longer the word, the more difficult it is to understand. Instead of: differentiate Try: tell apart Instead of: appropriate dosage Try: right amount
Use short and uncomplicated sentences	• Short sentences are easier to read and remember. • Remove unnecessary and extraneous facts. • Sentences should cover only one concept. • Focus on being clear and consistent. Instead of: What types of medicines need to be obtained? Try: What types of medicines are needed? Instead of: Patients should arrange an appointment by phone prior to arriving at the health facility. Try: Call before you come to the clinic.

Guidelines for Writing Text	
Choose familiar, easy-to-read fonts	• Use two fonts per document. • Do not use fancy, artistic, or cute fonts, because they are distracting. • Use upper and lower case. • For maximum readability, use 11–13 point size. • If the print is *too* large (14-point or bigger), the text is also difficult to read.
Organize text so the reader can easily follow along[2]	• Use plenty of white space. • Use color to aid navigation; e.g., have headers with the same colors or shading. • Use numbered steps and sequences to aid navigation. • Edit your text.
Use text that engages the audience	• Use the active voice instead of passive voice. • Use a conversational and encouraging tone. • Use action-oriented words. • Use words that the audience relates to. (passive voice) Instead of: The baby was taken to the clinic by the mother. Try: The mother took the baby to the clinic. Instead of: Contact me by [date] if you have questions or need to reschedule the appointment at [number]. Try: If you need to change your meeting day or time, call us at [number]. We can also answer questions

[2] More information is in the design section.

Example of Using Plain Language

This section of a flipchart below provides basic information on spacing children. The language is clear, organized in groups, and headings and bullet points make it easy to follow for the user.



Selecting Visuals for Print Materials

Thoughtful use of images and photos helps to explain and emphasize text, decode the meaning of words, and make material easier to remember. The following serve as helpful guidelines.

Guidelines for Using Visuals Effectively	
Use illustrations or photos, rather than clip art	• Illustrations are often clearer than clip art. • Photos taken in local settings are more easily understood than photos from other countries. • Photos allow a person to see themselves in the picture and relate to what is happening. • Photos portray emotions clearly. • Illustrations may be more appropriate than photos for sensitive topics or instructions, especially when depicting anatomical instructions.
Select images of people and things that are culturally appropriate	• Use illustrations/photographs that depict people, places, and things familiar to them. • Depict people involved in all aspects of life and not only in traditional roles. • If using aspirational images, ensure they are culturally relevant and appropriate to the local context. • Use a local artist who creates images that are culturally appropriate.
Ensure consistency of visuals	• Select a set of consistent visuals (people, icons, photos, and illustrations) for a set of SBCC materials to show that each piece is related. • All illustrations in a material should be by the same artist or in a very similar style. • Make photos or illustrations stand out by adding a contrasting border.

Guidelines for Using Visuals Effectively	
Carefully select the images	• Illustrations, pictures, and designs can improve readability and enhance the appearance. • Visual images should illustrate the content in some way or act as navigational aids. • Make sure the images are immediately identifiable. • Images should complement each other and enhance the text. • Present one piece of information per image. Each image should communicate a single, distinct piece of information—in some cases, a message. • Use images that are straightforward and simple, rather than abstract, detailed, or busy. • Make sure objects are to scale, especially people's body parts. • Do not use a lot of images in the material. Clutter will distract audiences; remember to have plenty of white space. • Do not use print over a graphic**.** It is distracting to try to read text printed over an illustration or picture. • Use symbols and images familiar to the audience, rather than visuals of things that are unfamiliar and may confuse to them. Pretesting symbols is essential, since many times symbols are only familiar to more educated groups.

Example of Using Visuals to Enhance Understanding

This section of a leaflet demonstrates the use of visuals to enhance understanding.

Design and Layout of Materials

The first thing a reader notices when looking at print material is not what it says but how it *looks*—how it is organized. Formatting and layout can help the audience understand the message, content, and navigate the material.

Common Design Mistakes

- too many styles in one document
- multiple styles at the same time
- too many fonts and font sizes
- capitals for emphasis
- dense blocks of text

Guidelines for Effective Design and Layout

To avoid some of these mistakes consider the following guidelines.

Guidelines for Effective Design	
Ensure consistency in design	• Choose a clean, uncluttered design and use it consistently. • Use consistent formatting to guide the reader through the document.
Choose fonts and size	• See the Writing Text section on page 3.
Lay out in an appealing and coherent fashion	• Consider working with a grid—a foundation of guides and columns to create structure. • Ensure the placement of page elements does not hamper readability.

Guidelines for Effective Design	
Align documents left to right	• Align the document with a left edge. It's familiar and readers can concentrate on the words without thinking about the formatting. • When the alignment is right-justified, fully justified, or centered, the reader may become confused.
Use white space—empty area around text and visuals	• White space offers the reader visual relief, contributes to an uncluttered look, and improves the readability of a document. • A generous amount of white space throughout is part of a clean design. • White space also provides contrast for highlighting words or phrases.
Use high contrast	• Text is easiest to read when the print and the background color are in high contrast. • Older readers especially need high contrast for readability.

Emphasize key words or phrases	• Making the point size of print larger can make it stand out.
	• **Bolding** cues readers that the bolded sentence, phrase or word is important and should be noticed. But too much bolding together simply looks like very dark print.
	• The following strategies should be used sparingly:
	  ○ Using all capital letters is visually hard to read for more than a few words.
	  ○ Underlining is used to indicate Internet sites.
	  ○ Use italics with a just a word or a phrase.

Guidelines for Effective Design	
Use color for appeal and navigation	• Use consistent color for headings so readers know where they are at a glance. • Use color to emphasize new and important information or the next section. • Use appropriate colors. Some colors have distinct meanings. • Too many colors on the same page may be confusing.
Use organizational aids (e.g., tabbing) to guide the reader	• Headings and titles can help organize the text and help readers anticipate what's coming next. • Use page numbers where most readers expect them to be—at the bottom of the page. • If the document is organized into sections, give each section an easy-to-see number or letter. • Use checklists to as reminders and to summarize instructions that appear throughout a document. • Bullets and numbered lists break out detailed information that may otherwise get lost in text.

Example of Effective Design and Layout

Guidelines for Specific Print Materials

The information in the toolkit has discussed print materials in general. This section provides special considerations for specific print materials. Although all the guidelines listed below can apply to all materials, there are certain specific considerations for each specific type of material format. This section of the toolkit will review a few of them for the most common print materials.

Buttons, Stickers, T-shirts, or other small materials have limited space for messages, text, and other information. They are expensive to produce and distribute and have limited effect on individual behavior change. They are best used as reminders or to bring people's attention to it. They can be used to encourage dialogue. Below are some points IEC Officers should keep in mind when developing materials in these types of formats.
Creative Considerations • May not be the best material for introducing new information • Very little space for actual content—visual and text • Small area, but white space is still important • Simplicity in design is important
Distribution/Cost Issues • Costly to produce, desirable for their utility, and may be desired by other than the target audience

Posters, Billboards, Wall Hangings, Wall Writings, or other larger SBCC materials are usually displayed in public spaces. Despite the size, the amount of information and content will vary depending on the purpose and the audience.

Creative Considerations

- People usually drive or walk by, so they hold attention for a limited amount of time.
- Even though there is a lot of space, only have the most important messages and information on this material.
- Concise but compelling and memorable language is important.
- Bigger size text and visuals are needed since people view them from distances.
- High-quality visuals are needed to reproduce in large formats.
- White space is important since people will not be guided in viewing the material.
- Use a large format that gets attention but ensure the size matches the space where it will be placed.
- Laminate or print materials with a protective coating. If they are placed outside in the sun, ensure there is little glare from the coating.
- If taping, gluing, or stapling the material make sure that it is durable and remains posted over time.

Distribution/Cost Issues

- Posters/wall hangings are usually inexpensive to print especially in large numbers.
- Distribution is cumbersome and is often handled best directly from the printer. Make sure to send them flat and include a mailing or tracker distribution list.
- Billboards can be expensive to print because of their large size, the need for coatings to ensure they are protected from bad weather, and also many hoardings require rent to be paid by the month for the use of the space.
- Place these formats where your audience shops, uses transport, or congregates might attain maximum impact.

Leaflets, Brochures, and other handouts are usually handed out or available for pick up.
Creative Considerations • Limit the number of messages, but these formats hold more points than posters. • Consider using these materials as reminders for information or instructions for desired action shared during dialogues or counselling sessions. It should have the most important information, desired actions, and ways to motivate people to act. • Make sure the information is clear and understandable, since these materials are usually viewed privately (either at home or when picked up). • Use headings and bullets and group text together. • Keep levels of literacy in mind—ensure the words used are in plain language and that visuals support understanding. This is especially important if the material is instructional. • Lay out material so that people can follow along. A brochure can have many panels so ensure that it is ordered and numbered.
Distribution/Cost Issues • These can be costly to reproduce because each individual gets one to keep. • Distribution requires multiple levels of storage and distribution and careful monitoring to avoid stock outs or materials sitting at the first delivery point. • Ensure that the storage space is large enough; bugs, dust, dirt, and weather can be problematic in smaller facilities.

Newspapers, Newsletters, Magazines can be developed as a thematic series for the program.[3] They can be disseminated periodically. They are limited to a literate population and are good mechanisms for advocacy.
Creative Considerations • Ensure that key messages are in each issue. Even if the theme changes from issue to issue, key messages should be in each. • Make them as interactive as possible by using checklists, quizzes, and other methods to help the reader engage in the topic. • Information can be detailed in this format, but make sure the information is clear and understandable since these materials are usually viewed privately (either at home or when picked up). • Use headings, bullets, and grouping of text to help people keep track of what they are reading. • Keep levels of literacy in mind—ensure the words used are in plain language and visuals support understanding.
Distribution/Cost Issues • Electronic distribution can lower printing and distribution costs. • Budget for creative costs and development of content.

[3] Programs can use national/community newspapers and magazines for informational columns or for advertisements and announcements. This section does not cover these. The section covering working with the media has more on informational columns. For advertisements and announcements, guidelines will be similar to those of developing posters.

Training Manuals, Flip Charts, Counselling Cards, and other detailed materials
Creative Considerations • Information can be more detailed depending on who the audience is. They are usually used by health providers in facilities, training centers, in homes, or in small groups in the community. • Make them as interactive as possible by using checklists, activities, and quizzes. • For flip charts, use engaging stories, negotiation of behaviors, or discussion of visuals to engage the audience. During an IPC session limit it to no more then 15–20 minutes. Always ask for questions and always reinforce what was agreed, proposed, or desired. • Consider developing a stop-and-go tape to accompany the flip chart of counselling cards to ensure correct messages. • Keep levels of literacy in mind; ensure the words used are in plain language. • Use visuals to support text and information being shared or to create motivation for a promoted behavior.
Distribution/ Cost Issues • Flip charts need to be durable if they are carried in the community or used frequently in the health facility. Consider weight (e.g., 300 GSM art card) and size. Make sure they have good spiral binding and can stand up on their own to facilitate use. • Good quality printing is essential to encourage the use. • The same distribution issues as other print materials should be considered. • These formats usually require training on how to use them and the content; this training may cost additional money if it is not part of planned training events.

Guidelines for Developing Websites and Social Media

Taking into consideration the guidance presented in developing print materials, the following guidelines should be incorporated to design effective websites.

Guidelines for Developing Websites and other Online Media	

Content	• Most web users are looking for specific information or an answer to a question. They typically don't stay very long on one page.
	• Keep content in the center of the screen and above the fold (bottom of the monitor when webpage is opened). Limit the amount of scrolling a user has to do.
	• When it comes to health information, users want to quickly and easily
	  ○ understand the health problem or behavior
	  ○ find out how to take action
	• Include printer-friendly tools and resources.

Text	• Keep text static. Animated or moving text is distracting. • Put the most important information first so readers do not have to scroll down to find it. • Avoid using too many words on a page.
Visuals/graphics	• Incorporate audio and visual features to demonstrate or elaborate information. • Use graphics that will load quickly.
Simple and consistent layout	• Create a simple and engaging home page. • Put text in one column and do not divide into many sections. • Use bold colors with contrast. Avoid dark backgrounds. • Use short pages and limit the amount the user has to scroll down to view the content.

Guidelines for Developing Websites and other Online Media	
Easy navigation	• Simplify screen-based controls and enlarge buttons. • Enable easy access to home and menu pages. • Label links clearly. • Minimize the number of links provided on each page. • Put only a few choices on the navigation pane and use clear, simple menu labels.
Have a search function	• Include simple search and browse options. • Design the search function to accommodate common spelling mistakes—for example, “klinik” instead of clinic.

Tips and Guidelines for Developing Radio and Television

Developing radio and television programming is a popular, but expensive undertaking in SBCC. Since your program develops these types of materials, keep the following guidelines in mind.

Guidelines for Developing Radio and Television	

Choose actors and voices carefully	• The speed and intensity with which the actors speak can create an atmosphere or mood for the spot.
	• The speech patterns of your script, actors, and announcers should be the same as those of your target audience.
	• Use voices, accents, and characters that your audience trusts to give them information. People will be more likely to listen and respond to your spots if they believe in and trust the people talking in them.
	  ○ You could use a real person who is well respected by your target audience, such as a popular entertainer or other well-known person.
	  ○ You could create a fictional character that represents a trustworthy source of information.
	• Monitor intensity (volume): People generally speak loudly when they are angry or excited. They speak more softly when they are talking lovingly or “aside” to someone else.
	• If two or more characters are of the same gender, select actors or announcers whose voices do not sound the same. The general rule us to use no more than three voices of the same sex in one spot.
	• Be sure the voices sound balanced or natural.

Guidelines for Developing Radio and Television	
Use music effectively	• Music can attract attention, spice up a spot, establish a mood. • Music is often played softly underneath the announcer's voice or in the background, which can contribute to the mood of or add emotional strength to the material. • A musical transition, or segue, is two to five seconds of music that separates scenes or portions of the spot, or signifies the end of a scene. • Musical transitions can also be used to shift from one location to another in the same scene or change the mood of one scene into another for the following scene. • Use a signature tune. It may be used to maintain continuity from one spot to another. A jingle is often the program slogan put to music. • The best jingles are catchy tunes that stick in a listener's mind, reinforcing the message long after the spot has gone off the air. • Have a consistent opening and closing theme song/music that quickly identifies the program for the listener. • It is best to use instrumental music (without words) when people are speaking because vocal performances tend to compete for the listener's attention. • Be aware of the dynamic range of the music (the distance between the softest sounds and the loudest sounds in a piece) because it can "disappear" during quieter parts.

Guidelines for Developing Radio and Television	
Sound effects	• Sound effects can help establish a place. People talking and babies crying could sound like a clinic or hospital. • Sound effects can help create a mood: The sound of a woman humming while sweeping the floor can create a happy, homey image. The sound of running feet and banging doors can create a sense of urgency. • Sound effects can help establish time: The sound of roosters crowing tells the listener that it is early morning, while the chirping of crickets usually means it is evening. • Sound effects can create a transition. • Decide which sounds are needed to help the listener/viewer understand where the characters are or where the action takes place. • Use a memorable slogan, theme, music, or sound effects to aid recall. • Do not use too many! Too many sound effects are confusing to the ear and distract the listener from the key message. • Do not use sound effects that are meaningless in the scene. • Test any sound effect with your target audience to make sure that they understand it and do not find it distracting.
Visuals (video only)	• Use only a few characters. • Make the message understandable from the visual portrayal alone. • Superimpose text on the screen to reinforce the oral message's main points. • If the action is to call, show the phone number on the screen for at least 5 seconds, and reinforce orally.

Guidelines for Developing Radio and Television	
Continuity	• Many elements of your radio/television spots should stay the same over time to help give your radio materials continuity. • Consider using a visual, special voice, music, sound effect, slogan, or jingle in all of your spots.
Timing	• Identify the main issue in the first 10 seconds in an attention-getting way. • Use 30-second spots to present and repeat the complete message; use 10-second spots only for reminders. • Summarize or repeat the main point or message at the close.
Scripts	• Type the script. Typing should be neat, with no strikeovers or deletions. Some minor changes may be added in pencil, if necessary. • Double-space the script. Use only one side of the paper. • Use standard-size paper. Choose a heavier grade that will not rattle when handled. • Number the pages. If the script is more than one page long, number all pages at the top. • Number the lines. If you have a complex, longer script involving several characters, music, or sound effects, number the lines to help actors and announcers know where to start during production. • Use script headings or headers. At a minimum, headings should include the spot's title, client, product/idea (e.g., ITN, prompt treatment), medium, language, and duration. • Other helpful information can include names of the writer, director and/or producer, date and time of production, scenes, cast list, music, and sound effects list.

Reviewing a Script

The script is more than just a text; it is a road map that helps the production staff to prepare the spot as efficiently as possible. Below are some guidelines for reviewing scripts:

Divided into two columns (three columns for television, one column has visual directions).	• On the left is a short column that identifies the source of each sound (voice, music, or sound effect). • On the right is the main column where the spoken lines and instructions for sound effects and music cues are written.
Indicating voice cues	• If a single voice is used, it is frequently designated as ANNCR for announcer or NARR for narrator. • Multiple voices may be identified by the names of their characters such as MARY, or if the role is too small to have a name, as MALE VOICE, FEMALE VOICE, VOICE #1, VOICE #2.
Identifying characters	• If the script calls for multiple characters, be sure they are addressed by name, especially when they first appear. • Make sure that there are not too many characters and that their voices are different.
Notes to actor	• Note in parentheses and capital letters any directions concerning emotion, rhythm, and style for the actors and announcers, such as (IRRITATED) and (NERVOUSLY) • Indicate that you want the actor to change tone or rhythm within the same speech by writing (TRANSITION) or (TRANS). • Indicate when the actor or announcer should pause when speaking. • Underline words that you want the actors or announcers to emphasize.

Indicating music cues	• Simply write MUSIC in the left column and a description of the music you want played in the right column. Capitalize the entire phrase. • SOUND (or SFX, for sound effects) is written in the left column, with the description of the sound effect you want in the right column.

Example Script

Title:	Big Five
Duration:	45 Sec Radio Spot
Suggested Introduction What the announcer will say before playing the spot	None
Music What kind of music will be in the script	Jingle
Sound Effects (SFX) What kind of sounds effects	lion roar snake hiss elephant trumpeting mosquito buzz up and under thump
Narrative	ANNCR Africa's biggest killer is not the lion SFX LION ROAR ANNCR It's not the elephant SFX ELEPHANT TRUMPETING ANNCR Nor the Snake SFX SNAKE HISS ANNCR Actually it's…. SFX MOSQUITO BUZZ UP AND UNDER ANNCR the tiny night biting mosquito—that carries malaria. But insecticide-treated mosquito

		nets kill mosquitoes on contact, protecting you and your family. These modern nets are totally safe, work all night long and must be retreated to stay effective. Use an insecticide-treated net with the green NetMark seal of quality. Insecticide-Treated Nets Kill Mosquitoes.
Closing Tagline or closing statement	ANNCR (TAG) MUSIC ANNCR SFX	Insecticide treated nets… JINGLE kill mosquitoes. THUMP

Developing Mid-Media

Mid-media are effective channels to stimulate and engage your target audience. They do not have to be expensive, but they need to be thoughtfully conceptualized and planned to be effective. Developing mid-media activities is similar to developing radio or television programs—except they will be live. Many of the considerations are the same, but more attention to practice and logistics is needed. As your program develops these types of materials, keep the following guidelines in mind.

Guidelines for Developing Mid-Media Activities	
Scripts	• Scripts for mid-media will be similar to TV scripts, since they will outline what is to be said, sounds, and what the actors are doing. • Spend time developing the plot if it's a drama or play. If it is character driven, develop character profiles. • If this is a rally, develop talking points and instructions for the speakers.
Choose actors carefully	• Train actors in the content. • Explain that they are not to improvise, but to follow the script. • Hold several rehearsals for reading the script. • Hold dress rehearsals where the entire event is to take place.
Continuity	• Many elements of your mid-media activities should stay the same over time to help give your campaign continuity.

Guidelines for Developing Mid-Media Activities	

Timing	• Identify the main issue in the first 10 seconds in an attention-getting way.
	• Summarize or repeat the main point or message at the close.
	• If there is audience interaction:
	  ○ Make sure question time is facilitated.
	  ○ Make sure there is time for questions and interaction throughout the event, and not only at the end.

Logistics	• Think about where you want the hold the mid-media event. • Consider getting police permission or a letter from the health department stating that the activity is being conducted for them. • Plan for travel and transport of all props, actors, and other equipment. • Count the number of viewers at the beginning and end of the show. Some people may drift away without waiting to see the entire act.

Timing of Material Development

Timing is important. It takes time to develop materials, especially if working with a creative agency outside of the organization. Think about when the materials are needed and ensure there is sufficient time to develop the materials.

Timing of Developing Materials	
Step and Timing	**Considerations**
Developing the creative brief 1 week	• This varies based on writer's experience with creative brief, number of materials, complexity of materials, and whether no additional formative research is required.
Procurement of creative agency Up to 1.5 months	• This depends on the organization's rules. • The time needed to advertise the RFP is usually anywhere from 5–15 business days. • Evaluations can take up to 2 weeks. • Negotiations on proposal, especially cost proposal, can take several rounds.
Developing concepts 1 week	• The agency will develop the overall concept and approach for the campaign. The less complex, the less time it will take.
Concept testing 1–2 weeks	• This will vary depending on number of locations, audience segments, and how long it will take to synthesize testing results into comments for the agency.
Developing draft materials 2 weeks–1 month	• The less complex the material, the less time it will take to develop. • Provide the content to the agency; it can save time by ensuring technical accuracy. • Audio and visual materials may require script-writing at this stage. If you want rough-cuts, add time to hire actors, produce, and edit.

Timing of Developing Materials	
Pretesting 1–2 weeks	• This will vary depending on the number of locations, audience segments, and how long it will take to synthesize testing results into comments for the agency.
Revisions 2 days–2 weeks	• This depends on how complex and extensive the changes are. • Minor changes to easy formats such as posters can be turned around fast. • Major changes to any format, especially audio and visual, will take longer.
Review and approvals 1–2 weeks	• Technical review by internal staff can take about a week for review and synthesis. • Technical review by external staff may take longer due to people's schedules.
Final materials 2 days–2 weeks	• Receipt of final electronic files can happen quickly. • Production of print materials may take time since printers need at least 2 weeks—more for larger runs and for materials that need assembly. • See section on Production of Quality Materials for more information.

Checklist – Reviewing Creative Considerations

Use this checklist to gauge whether audiences will understand, accept, and respond to proposed messages and materials.

Appropriate Text (or spoken language)	
☐ Plain language is used.	☐ Fonts are familiar and easy to read.
☐ Short, uncomplicated sentences are used.	☐ Reader can easily follow the text.
Attractive Visuals	
☐ Visual and artwork are similar in style.	☐ Images of people and things are culturally appropriate.
☐ Photos or drawings stand out.	☐ Colors selected attract attention.
☐ Images are straightforward and simple, rather than abstract, detailed, or busy.	☐ Familiar symbols and images are used.
	☐ Images present one piece of information.
Appealing Design and Layout (for Print Materials)	
☐ A consistent design is used.	☐ Colors have good contrast.
☐ Fonts are easily read by audience.	☐ Emphasis (e.g., bolding) is used appropriately.
☐ Print size is appropriate for the material.	☐ Titles, headers, numbers, and bullets assist audience to navigate the material.
☐ Layout is clear and easily followed.	☐ There are a limited number of styles (text and visuals) in the material.
☐ The amount of white space is appropriate	

Considerations for Radio and Television	
☐ Audience can relate to the voices and actors in the script.	☐ Has a signature tune or logo.
☐ Audience can trust voices, accents, and actors to give them information.	☐ Sound effects establish a place, mood, time, or transition effectively.
☐ Voices sound balanced or natural.	☐ Meaningless sound effects are removed.
☐ Voices and sound effects are used to attract attention, spice up a spot, establish a mood.	☐ Script and/or storyboards have been reviewed and formatted.
Cost and Timing	
☐ Development and production costs budgeted.	☐ Program has sufficient budget.
☐ Testing has been budgeted.	☐ Development timeline has been created and reviewed.

Booklet E: Work with a Creative Agency

Advantages to hiring an external creative or agency:

- Can provide a needed perspective on the existing creative brief, further refining or expanding concepts and offering suggestions not yet considered
- Can be helpful in conceptualizing and designing a whole intervention with a set of mutually supportive activities and materials rather than stand-alone materials
- Can support health communication programmers to create and strengthen linkages between activities and materials, turning them into a recognizable campaign with logos and slogans

The creative team can include:

- artists
- graphic designers
- video producers
- writers
- actors
- musicians
- other professionals
-

This section of the toolkit will provide guidance and tips on selecting, hiring, and managing creative agencies to develop effective materials that will achieve your communication objectives.

Contents

Understanding and Identifying Potential Creative Agencies

Consider these questions to decide whether you are prepared to hire a creative agency:

Do you have a clear strategy statement to guide the agency? This is in the creative brief.

- ☐ Goal and selected audience(s) for the activity or material(s)
- ☐ Desired changes, barriers, and communication objectives
- ☐ Message brief
- ☐ Key content and tone
- ☐ Media mix and other creative considerations

Have you developed a list of creative agencies to contact?

- ☐ Asked other health program managers for recommendations
- ☐ Looked at the websites of agencies where you can view their portfolios

What services do you need?

- ☐ Creative
  - The creation of the specific advertising products, from TV spots to logos to billboards, constitutes the "creative" services.
- ☐ Production
  - In-house production people who help them prepare and generate products and manage any outsiders who may be involved in production.
- ☐ Account planning
  - In-house experts who conduct and analyze market research, then help develop an overall strategy.
- ☐ Account service
  - Specialists who handle the "client side," act as the liaison person between the client and agency, and manage the work the agency is doing on the client's behalf.
- ☐ Media buying
  - These professionals buy media time or space on the clients' behalf.

Do you have a good idea of what works and what doesn't?

- ☐ Ensure you have staff that can review drafts from the creative agency. Staff should be able to review materials for technical quality and for more than the materials looking good.

Does your staff have the technical expertise?

- ☐ Ensure that you can provide the technical content. The creative agency professionals are experts in materials development, not the health area.

Do you have a budget?

- ☐ Examine potential creative design and production costs. When considering whether you have enough money in the budget, keep the following possible costs in mind.

Potential Costs
Production of radio and TV spots (or longer content) • Fees or salaries for artists, graphic designers, scriptwriters, actors, musicians, producers, photographers, videographers, and technicians • Concept tests • Fees for writers, editors, and technical content reviewers • Studio and equipment rental • Airtime • Distribution • Travel to meetings or production locations
Production of posters, flip charts, comic books, games, or other printed materials • Fees or salaries for writers, editors, artists, and graphic designers • Printing and distribution
Overhead and Incidentals • Telephone, Internet, fax, postage • Administrative costs • Other transportation costs

Selecting and Hiring an Agency

The selection process for hiring a full-service agency or a team of creative professionals should be competitive. The following standard approach is usually followed.

1. Develop and publicly issue an RFP that describes the specific work needed and states the selection criteria to be used.

Tips for Developing an Effective RFP

- Allow enough time to develop a detailed RFP and have other technical staff review the RFP for completeness.
- Develop clear selection criteria that may include:
    - the agency's experience with the intended format (e.g., radio or print)
    - experience in the technical area (e.g., family planning, nutrition)
    - references from previous clients
    - samples of previous work
- Ensure that the scope of work requests draft and final products.
- If consistent with Ministry guidelines, request a budget by tasks for analysis and negotiations.
- Explain that you will provide technical content but expect the agency to change it for effective communication.
- Allow time for technical review, revision, approvals, and pretesting.
- According to your agency rules, hold back large payments until all the final materials are submitted as required.

Approximate Time

- Estimate 1–2 weeks to develop a list of creative agencies to which you will send the RFP.
- Estimate approximately 1 week to develop and publicly issue an RFP.
- RFPs are usually advertised for 5–15 business days (varies by the expected size of award).

2. Organize a group of reviewers to evaluate the responses.

Tips for Organizing the Evaluation Process
• Form the evaluation team and develop your evaluation forms before the advertisement period closes. • All evaluators should score the proposals individually. Send each evaluator the RFP, proposals, and evaluation forms. • Ensure your forms have space for the evaluators to note strengths, weaknesses, and questions about the submission that you want clarified.
Approximate Time
• Estimate 1–2 weeks to evaluate and compile results of proposals.

3. Eliminate the unresponsive proposals—those that did not provide most of the information requested.

4. Evaluate all submissions. The evaluators should score applicants according the selection criteria outlined in the RFP.

Questions to Consider when Evaluating Technical Proposals
Capabilities • Does the creative agency have past experience developing similar formats, working in the health sector, and so on? • Does the proposed staff have the experience needed? Are they appropriate for the work needed? • What do past clients say about their experience working with the creative agency? Were they satisfied with the process? Final products? Quality of Creative (past work samples submitted) • Are they of good quality? • Do they follow the guidelines for effective materials? See Booklets C and D. Understanding of the Requested Scope of Work • What is the agency's understanding of the work listed in the RFP? Do they listen? • What is the proposed approach? How have they demonstrated what the creative work might look like for your campaign? • How does the agency work? Do they have clear lines of communication? Will most of the work be done in house or will it be contracted out? • Is the timeline reasonable? Cost • Do costs seem high compared to what you think it will cost? Compared to other proposals? • Were costs for production, staffing, printing, development broken out? Do you know what each material will cost? • Does the amount proposed match what is proposed in the creative work? Does the staffing level look appropriate?

5. Once all the scores are submitted, compile the scores and evaluators' comments. Many times, it is beneficial to organize a meeting with all the evaluators to discuss the scores.

Tips for Selecting the Top Agency(s) to Continue Negotiations
• Select the top agency or agencies with whom to pursue clarifications and further discussions. • You can also invite the top firms to make oral presentations before making a final selection. This must be stated in the RFP if you want to do this. • Send clarifying questions; the evaluation team may rescore based on the responses.
Approximate Time
• Give your top creative agencies at least a week to respond to clarifications.

6. Send clarification questions, if any, to the agencies and rescore the evaluations if necessary based on the evaluators meeting and responses to questions.

7. Conduct negotiations with highest scorer.

Tips for Finalizing and Negotiating the Contract with Selected Agency
• Before signing a contract, ensure the agency reviews the final scope of work and agrees to the deliverables, working relationships, costs, and reporting requirements. • Be sure to specify in the contract which agency staff will work on the project, in what capacity, and the overall effort. • Request a production schedule and insist on reviewing and approving proofs before printing, even if the final art work has been approved. • Agree on pretesting and approvals required, when they will occur, and how long the process will take.
Approximate Time • Give yourself at least a month to complete this process, especially if the contract value will be significant.

8. Check references and make the final selection.

9. Negotiate final details with the winner and sign the contract.

10. Inform applicants who didn't win the contract.

11. Schedule a briefing or kick-off meeting with the creative agency.

Establishing Roles and Responsibilities

In working with creative professionals it is always important to define clearly what needs to be done, to establish roles, set expectations, monitor progress, answer questions, and provide support.

Consider the following areas to make your collaboration with a creative team more successful.

During the Kick-Off Meeting
• Ensure that each member of the creative team understands the creative brief and the purpose of the work. • Help the creative team to understand the objectives and concerns and what you've learned about the intended audience so that they can use their expertise to suggest effective approaches. • Clarify that the organization will provide content for all print materials and mid-media approaches to develop effective communication materials. • Ensure that your staff who are attending the meeting do not say, "I don't know what I want; you're the creative one." • Explain sensitive issues, how to address literacy, and key content points to be conveyed in the material or activity. Let the team know that work in progress will be reviewed with this perspective and with the creative brief in mind. • Introduce the team that will be working with the creative agency throughout the process. • Establish a process for review of draft materials.

Periodically Throughout the Materials Development Process
• Set regular meetings to learn about progress and address concerns. • Involve the creative team in concept and pretesting, if possible. Ask them to observe the tests. • As you receive draft materials and messages, assess them against the creative brief, SBCC strategy, and audience data. • Conduct periodic reviews of drafts to ensure the materials do not stray too far from what you intended.

Understand Each Other's Roles	
IEC Officers • ensure appropriateness and accuracy of the content of the material or activity • ensure materials appeal to audience • maintain the program's strategic focus • give final approvals for all materials • conduct pretests, analyze results, and communicate changes	Creative Agency • translate technical content into appealing and effective materials • present detailed or professional language in a way that does not confuse the intended audience • provide creative direction and concepts

Checklist – Final Check for Hiring and Working with a Creative Agency

Understanding and identifying potential agencies	☐ Understood what materials will be developed ☐ Knew what creative services are needed ☐ Compiled a list of potential agencies ☐ Estimated costs for materials you would like to develop and have sufficient budget.
Selecting and hiring an agency	☐ Publically advertised a detailed RFP ☐ Developed detailed selection criteria ☐ Recruited an evaluation team ☐ Developed evaluation forms ☐ Evaluated proposals—technical and cost ☐ Continue negotiations with best scoring agencies ☐ Sent questions and clarifications to top agencies ☐ Checked references ☐ Selected final agency ☐ Conducted final negotiations and creative agency is in agreement with final scope of work ☐ Scheduled kick-off meeting
Managing your contract with an agency	☐ Designated a person or team to work with agency in the review of drafts ☐ Creative team understood the scope of work and expectations ☐ Developed a review and approval system ☐ Scheduled regular meetings for check-ins ☐ Creative agency understood that you will be providing the technical direction, review, and approval of all materials ☐ IEC Officers understood the creative agency have expertise in translating technical content into appealing and effective materials

Booklet F: Test Materials

There are two kinds of testing that happen during the process of creating health communication products—concept testing and pretesting. Each test has a similar methodology, but the purpose and timing are different.

Below is a quick overview of the two types of testing covered in this toolkit.

Type Testing	**Concept Test**	**Pretest**
Purpose of Test	Reaction to: • key messages • materials formats Information on what motivates and interests the audience	Reaction to: • materials • visuals, text, colors, audio Feedback on materials about: • comprehension • attractiveness • relevance • acceptance • improvements • gross negatives
When	Before drafts are developed	After concept testing and development of first drafts

Contents

Limitations and Benefits of Testing

Limitations of testing:

- Tests are as objective as the person designing or interpreting them.
- Tests cannot absolutely predict or guarantee that your audience will change behaviors.
- Tests are not statistically precise.
- Tests are not a substitute for judgment and expertise.

Testing allows IEC Officers to consult audiences to develop effective materials by assessing the following elements.

- Attention – How do we get our audience's attention?
- Comprehension – How do we increase knowledge and know what works best?
- Motivation – What will motivate our clients to perform the desired change?
- Recall – What information should we include or keep out?
- Personal and cultural relevance – does our target audience relate to the materials?
- Areas for Improvement -- weak and strong points – what appeals to the target audience? What can be improved? Are there sensitive or controversial elements

Concept Testing

Concept testing looks at the essence of what is to be communicated—before investing much time in developing draft materials.

Audiences provide information about

- what motivates them
- what benefits they see might result from changes in behavior
- what they like and dislike about a material or activity, and their reasons why

> ***Tip:*** *Concept testing can be done by a creative firm; however, pretests and field tests should always be done by the program or another contractor to avoid bias.*

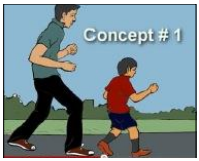
Concept testing differs from pretesting.

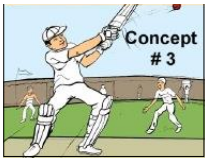
- **Timing:** Concept testing occurs earlier in the materials development process.
- **Types of questions:** Concept-testing questions are more open. They address concepts and formats before materials are developed and then pretested.

Tips for Concept Testing

When conducting concept tests:

- Present at least two draft formats or concepts to determine which one is preferred.
- Use concepts in the form of drawings, black and white printouts, or mock-up designs.
- Provide background and describe the concepts to participants.
- Ask participants to rank a group of concepts from most to least compelling, explain their rankings, and discuss benefits and problems associated with each concept.
- During the test, identify
    - which concept has the strongest appeal and potential for effect
    - confusing terms or concepts
    - language used by the intended audience
    - new concepts





Three concepts around fathers' involvement in child feeding were tested prior to developing storylines for TV spots (Alive & Thrive 2012)

Sample Concept Testing Questions

When conducting concept tests, the methodology does not differ from pretesting, but the questions do. Below are some sample questions that concept tests can ask. In the Appendix, there is an example of a concept test guide.

Audience's perceptions of their lives and key motivators

1. How do you feel about [topic] in your life?
2. What do you feel when you envision the future?
3. What influences people like you to make changes in the way you live your life?

Audience's opinions of the concepts presented

1. What's your general reaction to this draft/mock-up?
2. Can you describe what you see in this picture?
3. For whom do you think this material or activity is meant?

Audience's rating of the best concept

1. Which of the concepts do you find most attractive?
2. Which one do you think is easiest to understand?
3. Which one do you think shows a situation closest to your life?
4. Which one presents the most believable message?

Pretesting

Pretesting occurs after concept testing and the design and formatting of the first draft of the material.

Pretesting focuses on five areas of assessment.

Comprehension	• Does the audience clearly understand the content of the material? • Is the visual presentation clear?
Attractiveness	• Does the material capture the audience's attention?
Acceptance	• Does the audience accept the content and presentation as relevant to them? • Is it appropriate for the culture?
Involvement	• Does the audience identify with the material? • Do they feel it speaks to them and their experiences?
Relevance	• Does the material make the audience think and talk to others about change? • Does it induce them to find more information or services and seek solutions?
Improvement	• Can anything be done to improve the materials?

Tips for Pretests

- Make sure pretest participants are representative of the intended audience to be reached.
- Pretests and concept tests should not be conducted in the same community.
- Show only one message or portion of the material at a time, so respondents can focus their attention.
- Try to set aside all expectations when listening to audience members or reviewing pretest findings.
    - Hear what they are really saying and decide what it means for the final materials.
- The materials should look professional and as close to the final product as possible.
    - You want the audience to react and provide information on the materials the program plans to use.
- There is no magic number of pretests to get perfect materials, but as the suggestions for changes and improvements become minor, programs can stop pretesting and finalize the materials.

Sample Pretest Questions

Below are some sample questions that pretests can ask. In the Appendix, there is a sample pretest guide.

- What is the main idea of this brochure, radio spot, or other type of material?
- Is this material for people like you or for other people?
- Is there anything about the material or product that might confuse, offend, or embarrass some people? What, in particular?
- Is there anything in the material that you really like? Which part? Why?
- Is there anything in the material that you do not like? Which part? Why?
- Is the information/scenario/story believable? Why or why not?
- Do you think the material is attractive or appealing? Why or why not?
- What do you think can be done to make the material better?
- Do you think this material will help people? How?

How to Organize a Test

Organizing a test is similar to organizing any event for the audience, whether a training or focus group discussion. This section has some general guidelines to plan and conduct testing. For testing the following need to be planned:

- Develop a testing design.
- Choose a testing method and develop the tools.
- Arrange for a venue, staff, and other logistics.
- Recruit participants.

Develop a Testing Design

When developing your testing design, consider the elements in the table below.

Type of Testing Planned • Concept test • Pretest
Objectives of the Test • What do you want to learn during your test? • Is there anything in particular you want feedback on?
Questions to be Answered • What are the general questions you want answered in the test? • These are not the final questions, but an outline; final questions are formed when developing the tools.
Audience Members to Include • Who are the primary (intended) audience members? • Are there any secondary or tertiary audiences you want to include?
Audience Segments to Recruit • How is your audience segmented (e.g., urban, rural, SEC, male, female, youth, older)? • Which ones are important to have at the tests?
Number of Testing Sessions • In how many locations will you conduct tests? • How many tests will you conduct per location? • How many sessions will you hold per audience segment? • How many people will participate per session (for focus group discussions only)? • How many people will be reached per location (for individual methods only)?

Choose a Testing Method and Develop the Tools

Below are some methods and some guidelines when considering different methodologies and the tools needed to be developed.

Method and Guidelines
Focus Group Discussions • FGDs are small group gatherings of up to eight people who share characteristics such as age, gender, socioeconomic status, lifestyle, and literacy level. • People in the group should not know each other. • Discussions are led by a trained facilitator, and a separate, skilled note-taker is employed. • The number of focus group discussions held will depend on how diverse the intended audience is. • Focus group discussions are good for materials addressing social norms. • Tools needed to be developed: discussion guides, analysis tools, screening questionnaire
In-depth Interviews • IDIs are conducted one on one by an unbiased and trained professional with representative members of the intended audience. • They gather in-depth information about attitudes and beliefs and reactions to the draft materials and activities. • Often, they are used to get information about sensitive topics that people may not want to discuss in a larger group. • The numbers of interviews held depends on the diversity of the intended audience (normally two to four interviews are a minimum number). • Tools needed to be developed: interview guide, analysis tools

Method and Guidelines
Intercept Testing • This test is held in a public place, sometimes with people who are leaving a venue. • Interviewers ask for immediate reactions to a mid-media event, an audiovisual material just seen, or one played on a handheld computer or a mobile phone. • Tools needed to be developed: sampling guide, interview guide
Theater Testing • This test usually involves the presentation of an audio or audiovisual product to a larger group of audience members to register group likes or dislikes. • Depending on the size of the group, the set up can be similar to a focus group. • Theater testing can also involve filling in surveys to register group likes or dislikes. • Tools needed to be developed: interview guide, survey
Online Usability Testing • This test uses a survey form that is filled out by users of online tools or materials. • Tools needed to be developed: survey

How Should Results from Testing Be Used?

Testing participants are experts in what they understand and accept in a material, but not in material design. Not all suggestions should be followed; this requires professional judgment.

After conducting the tests, organize the notes, transcripts and other data and:

- Organize and summarize the main points.
- Review participant responses for major themes and where participants were in general agreement.
- Gauge the importance of making changes by the number of times participants point out problems with materials.
    - Since focus group discussion is not a quantitative method, however, counting the number of people for or against a change is not recommended.
- Describe patterns that emerged, or significant differences between groups.
- Share with the creative agency and the rest of the program the list of suggested revisions for materials based on the testing.

Testing Costs and Reducing the Cost of Testing

When developing a budget for testing, the following costs need to be considered:

- fees for skilled facilitators and note-takers
- payment to a mobilizer who recruits participants
- venue rental
- incentives and transport for participants
- transport for the concept test, pretest, and field test team(s)
- copies of drafts of materials if in print, or ability to play and present electronic or theater- or event-based media
- report writing
- meeting costs to review results with stakeholders

Reducing Testing Costs

IEC Officers with limited funds can still test materials. Here are some ways to decrease the cost of testing.

- Ask if partners can provide any of the following:
    - help with recruiting participants
    - a venue free of charge, perhaps their offices
    - moderators/interviewers
    - note-takers
- Are there any existing pretest guides you can use and adapt?
- When testing with a large number of respondents:
    - Keep the questions short and to the point.
    - Use as many close-ended or multiple choice questions as possible.
    - Develop codes in advance for quantifying responses to open-ended questions.
- If you can't hold a formal pretest:
    - Obtain feedback about materials by asking members of the intended audience what they think of the materials, whether it be in a clinic waiting room, at a local market, or even on a neighborhood street.
    - If you have ASHAs, peer educators or groups of people who regularly interact with your intended audience, give them a set of questions to ask and sample materials.

Conducting Stakeholder Reviews

Though stakeholder feedback cannot speak for the audience's context and perspective, this review can

- ensure that the materials are accurate and aligned with national or local guidelines and priorities
- earn important buy-in and support for the materials, including their distribution and use

Tips for Conducting a Stakeholder Review

- Involve reviewers at the concept development stage to avoid surprises. They can be given the creative brief and told when they can see drafts.
- If the stakeholder review is conducted before the pretest, it is unwise to make too many changes to the materials before intended audiences' input.
- If the stakeholder review is scheduled after the pretest, it is important to share pretest results.
- Educate reviewers about the purpose of the material or activity, using the creative brief.
- Ask stakeholders to check the technical content of materials and alignment with national priorities.
- Stakeholders should be aware of audience perspectives before they begin to make their suggested changes.
- If reviewers suggest a change that is inappropriate, work with them, discussing all their concerns and working toward a solution.

Common Challenges during Stakeholder Reviews and How to Address Them

Materials are viewed as competing with existing materials. • Point out work done to assess existing materials (materials inventory) at the beginning of the development process. • Discuss how these materials differ from and complement those of other organizations and describe the important audience needs that the materials aim to fill.
Stakeholders' perspectives differ from those of the intended audience. • Discuss findings from the concept test and pretest. • Outline how the materials are designed to meet the needs of the audience as expressed in the testing.
Stakeholders want the materials to address additional technical and program areas. • Review the communication objectives in the creative brief and explore coordination options. • Remind stakeholders that the materials are most effective when messages are tightly focused.
Stakeholders want to discuss each word and picture in the materials. • Manage the time available carefully. • Propose questions about technical content on which stakeholders should focus and let them know that any questions not addressed during the meeting will be followed up.
Stakeholders question whether messages and materials are appropriate. • Describe the work done so far—the analyses of the intended audience(s) and their context, as well as results from concept testing and pretesting. • Remind stakeholders that the materials are systematically tested for appropriateness with members of the intended audiences (which they may not represent themselves).

Checklist – Final Review for Testing Materials

Use this checklist to make sure your testing and reviews have met the standards below.

Concept Testing and Pretesting

- ☐ Different people were engaged in the concept test and pretest.
- ☐ Pretest respondents were representative of the intended audience.
- ☐ Questions covered the key assessment areas.
    - Comprehension
    - Attractiveness
    - Acceptance
    - Involvement
    - Relevance
    - Improvement
- ☐ Only one message or material—or one part of a material—was shown at a time.
- ☐ Participants knew that it is the material being tested, not their ability to read or understand.
- ☐ Participants were encouraged to be open and their fears about being criticized if they provide negative feedback were eliminated.
- ☐ A trained facilitator who speaks the local language, is culturally sensitive was used.
- ☐ Testing used a trained note-taker who speaks the local language.

Stakeholder Reviews

- ☐ Sent stakeholders copies of the creative brief prior to their review
- ☐ Had reports on concept test and pretesting available for stakeholders to review
- ☐ Asked stakeholders to review the technical accuracy of the materials and their alignment with national or local priorities and guidelines

Appendix A: Sample Question Guide

Screening

May I ask you some questions to find out whether you fit the required criteria?

1. Are you and your wife both able to have more children? Yes_ No_. **If no → Thank and end**
2. For women: How old are you? _____ **If under 18 or over 29 → Thank and end**
3. **For men only**: How old is your wife? ____ **If under 18 or over 29 → Thank and end**
4. What is the highest level of education that you have completed? _____

Introduction

Namaste! My name is _____ from IHBP. We are talking to men and women to get their opinions on materials about health and family planning. I'd like to show you all some materials and ask some questions that will help us make the materials better for people.

Question Guide for Posters

Instruction: First show poster with text covered or without text. Say: Please take a minute to look at this.

1. What do you believe this material is about?

Point to the main picture of the people and ask:

2. What is happening in this picture? What else?
3. Who are these people?
4. What are they doing?
5. Could the people in this image live in a village/town like yours***?*** (**Probe:** Why do they agree? ***If not ask:*** Why not?)
6. ***If there are children in the picture, ask:*** How old does each child look?
7. What do you like about the picture? For what reasons? What else do you like? For what reasons?
8. What **don't** you like about the picture? For what reasons? What else don't you like? For what reasons? (***Probe:*** If respondent says there is nothing about the poster that they don't like, thank them and then ask them what their peers would not like about the poster).
9. What would make the picture better? What else? Why?

Now show the print material version with the text.

10. Can you please tell me what the words on this poster say or would you like me to read them to you? ***READ THEM, if necessary***.
11. What words are unclear or confusing? Can you suggest other words that would be clearer? ***If respond NONE ask,*** what words might others find confusing or unclear?
12. Does the picture(s) help you understand the words? For what reasons?

13. After reading/hearing the words with the pictures, what do you believe is the main idea of the whole material?
14. Who do you think this material and messages are for? ***Probe:*** People like you? Those you live near?
15. Is there anything disturbing or offensive about the images or words? What? For what reasons?
16. Does this material ask people to do something? If so, what is that?
17. How important do you think this advice is for you and your family? For what reasons?
18. What is likely to happen if you/your family follow this advice?
19. How likely are you to follow this advice? Why? (***Probe:*** How believable and convincing are the messages? What might make it difficult to follow the advice?)
20. ***If not likely, ask:*** What would help or encourage you to follow the advice?
21. What changes do you suggest be made in this material to help people like you—and your family—follow this advice? ***(Specify what the key action is, if they don't know it.)***

Question Guide for Radio Spots

Expose three advertisements (radio spots) one at a time to the respondents.

1. What do you feel after listening to this? What are your first thoughts, moods, feelings? What does it remind you of? Why? Explain.
2. What are the things that you have immediately noticed in the storyboard? What are the things that caught your attention while listening to the storyboard? Why?
3. Suppose we have to give points to the radio spot based on appeal. What marks would you give on a scale of 10? Why?

Probe for the reasons for higher numbers and lower numbers. If respondents do not want to discuss related to themselves, ask about what others would say and why.

- What are the things you liked? Why?
- What are the things you did not like? Why?
- What changes should be made to improve things?

4. What is the main message that this storyboard is trying to convey? What is the story trying to tell us? Why do you feel this is so? What in the storyboard tells you that?
5. What do you think was happening in the drama/idea? Suppose you have to narrate the story that you have seen here to your colleagues. Then

what would you say? How would you explain the entire story?

Play the storyboard again and ask the following questions.

6. Was there anything additional that you understood from the idea/story—perhaps something that you did not understand/notice the first time I played it for you but something that you understood/noticed the second time? What would that be? Why didn't you notice it the first time?
7. If you are asked in a talk show how important this information is in your life, what you would say? Why? For whom is it most important? Why? Is this important for our society? Why/why not?
8. Is there anything unbelievable? What are those? Is there anything that you feel is exaggerated? Why/why not? Which voiceovers in the storyboard are exaggerated? Why do you think so?
9. If I were to ask you what you would recall from the idea a week later, what would you say? Which element did you find the most striking/memorable? Why?
10. Is there any new information that you have learned from the storyboard? What are those? Do you think the information communicated is sufficient to inform you and your colleagues? Why/why not? Is there any other information you would like to add?
11. What do you think about the overall storyboard? After watching the storyboard, what would be

people's reaction? Will they take the advice of the radio storyboards? Why/why not? Who would be willing to follow and who would be unwilling to follow? Why?

12. How can we improve the storyboard that would strengthen the comprehension and get families to follow this advice? Would you like to change any aspect of the storyline/messages?

Expose the other two advertisements (radio storyboard spots) to the respondents and repeat questions.

Question Guide for Stillomatics

Expose three advertisements (TV spots) one at a time to the respondents.

1. What do you feel after watching the storyboard? What are your first thoughts, moods, feelings? What does it remind you of? Why? Explain.
2. What are the elements that you have noticed in the storyboard? What are the things that immediately caught your attention while watching the storyboard? Why/how? What are the characters doing? Tell me more about that.
3. Suppose we have to give points to this storyboard based on the appeal. What marks would you give on a scale of 10? Why?

Probe for the reasons for higher numbers and lower numbers. If respondents do not want to discuss related

to themselves, ask about what others would say and why.

- What are the elements you liked? Why?
- What are the elements you did not like? Why?
- What changes should be made to improve the elements?

4. What is the main message that this storyboard is trying to convey? What is the story trying to tell us? Why do you feel so? What in the storyboard tells you that?
5. What do you think was happening in the story/idea? Suppose you have to narrate the story that you have seen here to your colleagues. Then what would you say? How would you explain the entire story?
6. In one line what would you say is the key message that the idea is trying to communicate?

Play the storyboard again and ask the following questions.

7. Was there anything additional that you understood from the idea/story? Perhaps something that you did not understand/notice the first time I played it for you but something that you understood/noticed the second time? What would that be? Why didn't you notice it first time?
8. If you are asked in a talk show how important this information is in your life, what you would say?

Why? For whom is it most important? Why? Is this important to our society? Why/why not?

9. Is there anything unbelievable? What are those? Is there anything that you feel is exaggerated? Why/why not? Which elements in the storyboard are exaggerated? Why do you think so?
10. If I were to ask you what you would recall from the idea a week later, what would you say? Which element did you find the most striking/memorable? Why?
11. Is there any new information that you have learned from the storyboard? What are those? Do you think the information communicated is sufficient to inform you and your colleagues? Why/why not? Any other information you would like to add?
12. What do you think about the overall storyboard? After watching the storyboard, what would be people's reaction? Will they take the advice of the TV storyboard? Why/why not? Who would be willing to follow and who would be unwilling to follow? Why?
13. How can we improve the storyboard that would strengthen the comprehension? Would you like to change any aspect of the storyline/messages?

Expose the other two advertisements (TV spots) to the respondents and repeat questions.

Appendix B: Sample Testing Questions for Specific Materials

Suggested Questions for Testing Pamphlets

*Ask these questions about each **page** of the pamphlet.*

1. Are there any words on this page you do not understand? What are they?
2. Is there anything on the page you do not believe to be true? What?
3. What about the picture on this page? What does it look like to you?
4. Is there anything about the pictures or the writing on this page that might offend or embarrass some people? What?
5. Is there anything on this page that you really like? What? Is there anything on this page that you don't like? What?
6. Is there anything on this page that is confusing? What?

*Ask these questions about the **entire pamphlet**.*

7. Do you think this pamphlet is asking you to do anything in particular? What?
8. Do you think the pamphlet is meant for people like yourself, or is it for other people? Why?
9. What do you think can be done to make this a better pamphlet?

10. Is this pamphlet useful? Is this pamphlet easy to follow?

Suggested Questions for Testing Posters

*Cover the words on the poster so that the group can respond only to the **images**.*

1. Please tell me what you see in this picture. What does it look like to you?
2. What about the people in the picture? What do you think they are doing?
3. Do you think this poster is asking you to do anything in particular? What?
4. Do the people in the picture remind you of your friends, or are these people different from your friends? Why?

*Uncover the **words** and cover the images.*

5. Are there any words that you do not understand? What are they?
6. Now, in your own words, what do you think this poster is saying?

Uncover the entire poster.

7. Is there anything about the picture or the writing that might offend or embarrass some people? What?
8. Is there anything on this poster that you really like? What?
9. Is there anything on this poster that you don't like? What? Is there anything on this poster that is confusing? What?
10. What do you think can be done to make this a better poster?

Suggested Questions for Testing Radio Spots

After playing the radio spot twice, ask

1. Who are the people in this radio message?
2. Can you hear and understand what they are saying?
3. Do you think the radio message is asking you to do anything in particular? What?
4. Is there anything in the message that you do not believe? What?
5. Does the radio message say anything that might offend anyone in your community? What?
6. What do you think you'll remember best about this radio message?
7. Do you think the message is meant for people like you, or is it for other people? Why?
8. In your own words, what do you think is the message of this radio spot?
9. Is the music appropriate for this radio message? Why?
10. Is there anything about the radio message that you particularly like? What?
11. Is there anything about the radio message that you do not like? What?
12. Is there anything in this radio message that is confusing? What?
13. Do you have any suggestions for making this a better radio message?

Suggestions for Testing Television Spots

After showing the television spot twice, ask

1. Who are the people in this television spot?
2. What do you think the people are doing?
3. Where do you think they are? What else is going on?
4. Do you think the television spot is asking you to do anything in particular? What?
5. Is there anything in the spot that you do not believe?
6. Does the television spot say anything that might offend anyone in your community? What?
7. Do you think the spot is meant for people like you, or is it for other people? Why?
8. In your own words, what do you think is the message?
9. Is there anything about the television spot that you particularly like? What?
10. Is there anything about the television spot that you did not like? What?
11. Is there anything in this television spot that was confusing? What?
12. Do you have any suggestions for making this a better television spot?

Suggestions for Testing Mid-Media Materials

After demonstrating the rally, street theater, or other activity, ask

1. Tell me in your own words what [material] is about.
2. Is there anything inappropriate in the story being told or in the way it is being told that might upset someone?
3. Are the characters in the story like the people they should represent?
4. What do you think the story is asking you to do?

TIP: *Many of the questions for testing mid-media materials will be similar to those of TV spots. The questions for mid-media should revolve around the key messages and dramatization.*

Booklet G: Implement your Communication Campaign

Implementing a communication campaign requires planning for producing, disseminating, and integrating the campaign into an overall program.

This section will guide you in deciding on and planning dissemination and where to air, display, or implement your communication campaign.

Another important consideration of implementing the communication campaign is the frequency and reach you would like your campaign to have.

All implementation is affected by budget. Although we have checked the budget to ensure we have enough to develop the campaign, we need to make sure that we have enough funding to implement it effectively.

Contents

Final Production and Duplication of Materials

Before making the final payout to the creative agency, ensure the materials are all finalized. For each type of material, several things may be need to be checked.

- For print materials:
    - Make sure that all changes requested were made.
    - Get the design files in electronic formats that are compatible with your system.
    - Get print-ready files as PDFs sized for print and email dissemination.
- For audio-visual materials, this means the radio or TV spot is fully produced and saved onto DVD in the format needed by the stations, such as a Digibeta tape, DVC pro tape, or soft copies in mpg4 format.
- For mid-media the scripts, templates and any other materials are finalized.

Checklist – Production of Quality Materials

Use the checklist below to guide you through the final review and production of materials.

Print Materials – Guidance to Printer	☐ Determined electronic versions are correct ☐ Printers know about the materials they are producing ☐ Agreed upon production schedule and completion date ☐ Agreed upon product packaging ☐ Agreed upon delivery method ☐ Determined preferred size of material ☐ Determined quality of paper and binding ☐ Determined colors ☐ Visited printer to ensure appropriate equipment ☐ Requested color proof before printing full order if the print run is large
Print Materials – Reviewing Print Materials Proof	☐ Paper quality, size, binding are correct ☐ Photos, illustrations, and text are clear and not distorted ☐ Colors do not bleed ☐ Binding and/or tabs do not interfere with material content ☐ Pages are in correct order ☐ Tabs are in appropriate space

Radio/TV Spots – Final Production	☐ Fully produced spot is correct length ☐ Content is correct ☐ Image and sound quality are as agreed ☐ Sound effects, voices, music, actors, background are as requested ☐ For TV, the spot is in focus and transitions are as requested ☐ The sound is clear without distortions or background noise that was not requested ☐ Spots are copied onto CDs/DVDs in appropriate format for stations
Online Materials – Final Review	☐ Page appears on screen as desired (use different sized monitors to check) ☐ All links work and direct people to the appropriate page and content ☐ All images are clear and undistorted ☐ Text is readable
Mid-Media	☐ Scripts or formats clearly present campaign messages ☐ Content is entertaining (if applicable) ☐ Opportunities for community engagement/feedback are present ☐ Theater troupes or other related vendors have been trained ☐ Routes/event schedules have been planned to ensure optimal target audience attendance

Specific Health Days in India

When considering timing of your activities, think about collaborating with other organizations participating in health days. Many times for health days, programs and organizations will organize events that you can utilize. Below is a list of some health days in India. For a full list visit: http://indianhealthservices.in/health_day_list.php

Event	Date
National Youth Day India	12 January
Oral Hygiene Day	5 February
Condom Week	8 to 14 February
Pregnancy Awareness Week	12 to 18 February
Women's Day	8 March
WHO Day	7 April
Safe Motherhood Day	10 April
Mothers' Day	Second Sunday in May
International Midwives' Day	5 May
International Nurses' Day	12 May
International Day of the Family	15 May
International Day Of Action For Women's Health	28 May
Doctors' Day	1 July
World Population Day	11 July
Breastfeeding Week	1 to 7 August
ASHA Diwas	23 August
Nutrition Week	1 to 7 September
Cleanliness Day	2 October
Mental Health Day	10 October
Children's Day	14 November
International Women's Safety Day	25 November
SAARC Day of the Girl Child	8 December

Training

Training is particularly important for rolling out job aids (materials intended to support communication efforts of providers, peer educators, ASHAs, etc.). When planning training, think about the following:

Who Should be Trained

- People who will use your communication materials
- People who deliver services through messages and materials
- People who reinforce your messages through IPC-/community-level activities

Examples: health care providers who will use the flip charts during their IPC sessions, peer educators who will conduct community outreach activities, journalists who will report on family planning

Training Content

- Ensure that learning objectives are SMART—Specific, Measurable, Attainable, Realistic, and Time-bound.
- Tailor training content for needs of participants.
- Make sure to feature and use actual materials during the training.
- Train on technical content so that the information shared is correct.
- Provide a summary of your situation analysis and communication strategy and how the materials fit into the overall communication campaign.
- Train on how to use the material correctly, why it was designed that way, and expected results/objectives.
- Train participants on how to tailor information and content when sharing with others.
- Train on improving communication skills (e.g., IPC).

When to Train • Check your implementation plan for when activities/campaign will be launched. • Train people before these activities happen and then plan refresher trainings. • To support learning and practices learned in training, set up a mentoring/support system. • If you are using peer educators, plan regular trainings throughout the life of the program since there is a high turnover rate for peer educators.
After Training • The follow-up activities such as mentoring, supervisory visits, and monitoring visits will be implemented. • Mentoring visits and or groups can provide support to trainees if there are any questions or challenges arising after the training. • Supervisory and monitoring visits can provide support to the trainees and also ensure quality implementation.

Checklist – Planning Trainings

When implementing trainings, review this checklist to make sure you have considered everything.

At least two weeks before	☐ Confirmed trainers/facilitators ☐ Recruited speakers and technical experts ☐ Invited training participants and invited them to bring examples of work relevant to training ☐ Provided information on venue, dates and time, and agenda ☐ Arranged site visits (if needed) ☐ Other_____ ☐ Other_____
At least one week before	☐ Made copies of registration forms ☐ Made copies of all handouts/and training materials for the participants ☐ Made flip charts of PowerPoint presentations with objectives for each session, content, and activities for trainees ☐ Other_____ ☐ Other_____
The night before	☐ Set up the workshop space/venue ☐ Ensured logistics for breaks ☐ Other_____ ☐ Other_____
After the training	☐ Sent thank you letters ☐ Other_____ ☐ Other_____

Where Will your Materials be Used

Mass Media	
Use and Placement	**Tips**
• Choose stations or carriers (cell phones, or webpages) that your intended audience listens to or uses. • Review stations for audience size (reach), audience profile. • Air spots during times your audience is listening or viewing. • Air and disseminate for at least 3–4 months. • Air spots at least twice a day on each station. For example if you have 3 radio spots on 2 stations, make sure they are aired 2 times a day x 3 spots x 2 stations = 12 times/day. This is a good general rule.	• Don't bring personal bias to media decisions, base them on data; don't refuse to buy time on a certain station because you don't like a presenter or show. • Ensure play or disseminate materials enough that the audience can hear, understand, remember, and try the desired change. • Don't rely solely on free air time. • Work with the government media placement agency to determine where best to air your mass media.

Print Materials	
Use and Placement	**Tips**
• Place materials where people can view or access them. • Choose a space where they stand out and will gain attention. • Choose an appropriate size for the space. • Place in a space where they will not be damaged or can easily be replaced. • Select an appropriate space where audience can view the entire material.	• Find a space where your audience has time to stop and view/interact with the material. For example if it is a leaflet, place it somewhere they spend enough time to review the material. • Place the material, especially posters, where there is little competition for viewing it, but where your target audience frequents and will see it.

Interpersonal and Mid-Media	
Use and Placement	**Tips**
• Choose an appropriate location and time of day to hold the event. • Ensure there is enough space for backdrops and props. • Find a location that is not too noisy and the audience can hear and see. • Set clear objectives for the event since this will affect the size of the desired group. • Determine what you want your audience to do since this will influence how many times you should repeat or reach your audience.	• If this is a dialogue or small group discussion, select a spot that is intimate and encourages discussion. • If the event is a public rally or street theater, find a spot that attracts your target audience. • Be prepared for people who are not your target audience to attend the event. • For discussions and dialogue, there are no more than 20–30 people. • If the purpose of the event is more than just sharing information, meet/interact with the audience at least 3 distinct times.

Implementing Mid-Media Activities

In addition to training, mid-media activities are important to the implementation of our campaign

Format	Advantages
Group Interaction Activities guides for discussion groups, agenda, and support materials for community meetings	**Advantages** • Able to discuss sensitive issues • Can respond immediately to the individual/group • May have more credibility • Can motivate, influence, and support **Disadvantages** • Requires specific training • Can be expensive initially and/or costly to scale up • Low reach and frequency • Difficult for intended audience to keep or pass on material • Difficult to keep messages consistent
Outreach Activities community, village to village, household, peer to peer	**Advantages** • Able to discuss sensitive issues • Can be more credible because it is face to face • Can respond immediately to the individual/group **Disadvantages** • Requires specific materials • Can be expensive initially and/or costly to scale up • Low reach and frequency • Difficult to keep messages consistent

Live Performances scripts for street theater, puppet shows, guides for talent shows and contests	**Advantages** • Can be entertaining • Able to discuss sensitive issues • May appeal to wider audience • May be culturally appropriate **Disadvantages** • Requires specific training • Can be expensive initially and/or costly to scale up • Low reach and frequency • Difficult to keep messages consistent

Supervision and Support

An important part of implementation of SBCC campaigns is providing supervision and support to staff to ensure they have a high-performing project. Consider the table below when developing the roles and responsibilities of the SBCC campaign.

How to Supervise and Support Staff	Tips
Clearly outline job expectation and provide performance feedback.	• Ensure there are clear job descriptions with roles and responsibilities laid out. • Set goals periodically and conduct evaluations against these goals. • Do not just evaluate what the staff has not achieved, but also what they have accomplished. • Conduct periodic supervisory visits that monitor staff's work, but also review what is needed for them to perform at a higher level.
Reward and motivate staff for good work.	• Ensure adequate workspace, equipment, and supplies. • Develop incentive and motivation schemes such as "employees of the month." • Share successes and good work with other offices and partners.

Increase the knowledge and skills of staff.	• Offer periodic trainings and capacity-strengthening resources for staff and volunteers. • Informal trainings such as briefings held during regular meetings can be implemented if staff does not have the funds or time to take off for a week-long training. • Ask staff to share what they have learned in external trainings with others in the office.
Implement supportive supervision techniques.	• Encourage a mentoring and two-way communication relationship between supervisor and staff. • Use positive techniques to improve staff performance rather than fault-finding.

Checklist – Final Review for Implementation

Integrating the Campaign into the Implementation Plan	☐ Listed out the program's activities ☐ ~~Knew~~ Know components of the communication campaign that will support this activity ☐ Determined what activities/materials need to be completed before the activity can be implemented ☐ Considered and planned trainings needed for campaign implementation ☐ Planned mid-media and IPC activities
Where Will Materials be Used?	☐ Planned for appropriate placement of materials where audience can see them ☐ Identified areas where audience can access and interact with the materials ☐ Selected mass media outlets that audience listens to, views, or accesses ☐ Ensured appropriate intensity of mass media campaign ☐ Selected appropriate times and locations for implementation of community activities ☐ Determined the number times the activity will reach the community

Booklet H: Work with the Media

As you plan to engage the media to promote and disseminate information, keep in mind what the media like and dislike. Always ask yourself**: What's in it for them?**

Remember, the media like

- stories with audience appeal
- issues that stimulate debate, controversy, or conflict
- stories that create higher ratings and larger audiences
- fresh angles or twists on issues that will attract public interest
- accurate background information

The media dislike

- covering old topics
- duplicating stories reported by competitors
- reporting inaccuracies or an incomplete picture
- receiving numerous calls when on a deadline
- people who persist when a story idea is rejected
- people who believe their story is interesting simply because it is theirs or who have the attitude that the importance of the story is obvious

Contents

Understand the Media Environment

Many times we may forget that media personnel are not health programmers, yet are interested in stories and events that will attract the attention of their readers and listeners.

After understanding what the media like, it is important to understand what the media environment is like. Think about the following:

- What do the media outlets in your area report on? Do the media report on your health topic or area of interest? How frequently? Accurately?
- Who is interested or might be interested in your program?

To answer these questions, program should

- monitor the media to see what they cover, how often, and the content
- make a list of media outlets (e.g., stations, newspapers, bloggers) who might be interested in your program
- compile a list of people to contact for your media events

Develop a Media Plan

Programs should consider the questions below in developing media plans.

Section	Guidelines and Example
Goals	Why are we engaging the media? *Example: to increase the accuracy and frequency of coverage of the benefits of institutional delivery and minimum 48-hour stay in a health facility by promoting Janani-Shishu Suraksha Karyakram (JSSK)*
Audiences	Who are the main audiences for the messages and information? *Example:* • *Primary – radio personalities and newspaper journalists* • *Secondary – editors and producers*
Main Content to be Communicated	What is the main content that needs to be communicated? Examples*:* • *JSSK would provide completely free and cashless services to pregnant women, including normal deliveries and caesarean operations, and to sick newborns (up to 30 days after birth) in government health institutions in both rural and urban areas.* • *Address barriers, myths, and misconceptions associated with delivering in a health facility, seeking antenatal care, eating nutritious food, and other known barriers.*

Section	Guidelines and Example
Story Angles	• What are some good story angles? • What will get people's attention or will interest, shock, or entertain them? Example: an interview with a satisfied couple who ~~used a were~~are beneficiaries of JSSK
Proposed Activities	What kind of events will we hold? Examples: • campaign launch • editor and journalist training on benefits of using institutional delivery and JSSK
Staff, Materials, Budget, and Partner Support Needed	What staff, materials, budget, and partner support are needed? Examples: • budget for campaign launch – planning, venue, demonstrations, copies of materials, media kits, speakers, refreshments • training costs

Engage the Media

When deciding to involve the media, it is important to plan how and when you will engage them. In addition, programs need to notify the media and prepare for the events.

Determine how to Engage the Media

Below is a table that provides some guidance on various events and methods for engaging the media along with some tips.

Press Conference/ Media Briefing/Campaign Launch
• Have events with time for media personnel to ask questions. Sometimes host a panel of experts. • Ensure events are appropriate, up-to-date, and newsworthy, such as campaign launches or significant program updates. • Ensure that you are clear as to what information will be given out and the purpose of the event. • Invite your guests and panel (if you have one) early and form an agenda. • Prepare and disseminate a press release and media advisory at least a week in advance. • Have promotional materials and media kits[1] available.
Tips • Have a high ranking official or someone who is respected attend so that the event is seen as newsworthy. • Schedule the event early in the week before other events and stories have taken priority. • Consider involving community members and other stakeholders. • Identify key spokespersons available for follow-up interviews. • Make sure the entire event does not involve speeches. Ensure there is an appropriate mix of activities such as screenings of spots, drama, Q&A. • Consider allowing media to teleconference in. • Holding a press event requires a lot of effort (planning) and expense.

[1] Media kits are pre-packaged materials for the media and other attendees at events. See Page ~~9~~ 17 for more information on what is in a media kit.

Interviews
• Participating in radio and television talk shows can allow IEC Officers to talk about the program's goals and experience related to the health topic. • Interviews can increase interest in the campaign's goals and reach audiences that might not typically be reached. • Interviews can be low cost ways of promoting the campaign.
Tips • When invited to be interviewed, ask if it will be live or taped, if there are call-in questions, and what other guests might be featured. • Learn as much as you can about the host and program. • Write down powerful anecdotes and personal stories that might be shared. • Remain calm during the interview, do not get defensive. • Present messages from the media plan as quickly and precisely as possible. • Refer the audience to campaign materials/activities for additional information instead of detailing them out during the interview.

Opinion Pieces
• These are used to express a strong opinion about an issue with local impact. • These are great ways to draw attention to an important issue, respond to criticism, correct false information, or recognize community support for an event or issue related to your campaign.
Tips • Ask local supporters to sign the letters for their local media outlet. • Ask a prominent person or expert or a group of organizations to write it. • Say something new or provide a fresh view. • Avoid criticizing others and only stating problems. Offer some recommendations and solutions.

Letters to the Editor
• They allow comment on a specific new story, editorial, or letter. • They can be used to respond to an article on a health topic you are interested in. • They can also be used to praise balanced and accurate coverage provided by a newspaper. • They can point out and correct important mistakes.
Tips • Keep letters short, concise, and fresh. • Do not repeat and reinforce negative information. • Consider using this format to reinforce a positive, accurate story about the health topic. • Be professional.

Create Publicity-Generating Events
• Various events, from roundtable conferences to concerts, can generate publicity and excitement. • These are often designed by public relations firms, in collaboration with an event planner.
Tips • They can be used to recruit or educate people to whom your target audience listens—and turn them into spokespeople for your effort. • Carefully consider the use of this type of event, as it requires careful design, planning, and implementation.

Social Media
• Reach out to new influencers and global stakeholders through online media tools and sites, including blogs. • If your audience is online, you may want to be as well. • Social media, such as Facebook and Twitter, make it easy for readers to share your content with others in their networks.
Tips • Share information, especially on topics where you would like feedback or to engage in an online dialogue. • Provide short updates that do not require much detail or explanation. • Be careful to monitor any social media tools you use, since naysayers are just as likely to engage as supporters.

Writing Press Releases

A press release is one- or two-page document that is sent to media outlets and news agencies or inserted in a press kit. It seeks to inform the media about a particular event, service, or product and convince journalists that the story is worth covering.

Format of a Press Release

- written in the third person
- never more than two pages, double-spaced
- has the most important components in the headline and first paragraph

The Five Ws of a Press Release

- answers five questions: **who, what, where, when**, and **why**
- also consider **who cares** and **so what**
- need to express the press release's purpose and grab the attention of everyone who reads it

Tips on Writing a Press Release

1. Select an appropriate angle for the story, based on the media plan. If possible, reference a current health and social issue as well as local personalities and events.
2. Open with a strong headline and opening paragraph to grab the reader's attention.
3. Try to illustrate the story and bring it to life for readers with real examples they can relate to or visualize.
4. Be concise. Do not bog down the release and the reader with unnecessary words.
5. Don't use medical clichés and jargon not understood by a general reader.
6. Check the release for spelling errors and ensure it is grammatically correct.
7. Stick to the facts and avoid embellishments.

Example Press Release

Ministry's name and logo

For immediate release

Contact information
[name]
[position]
[project/organization]
[contact information]

Government of India (GOI), Ministry of Health and Family Welfare (MOHFW) launches
Maternal Health and Family Planning Repositioning Campaign

29th October. New ~~Dehli~~Delhi, India.

Every day, 1,600 women and more than 10,000 newborns die from *preventable* complications during pregnancy and childbirth across the world. Almost **99 percent** of these maternal and **90 percent** of neonatal deaths occur in developing countries.

In India, in the Empowered Action Group (EAG) states (Uttar Pradesh, Uttaranchal, Bihar, Jharkhand, Madhya Pradesh, Chhattisgarh, Rajasthan, Orissa) and Assam, for every 100,000 live births more than 300 women* lose their lives for reasons related to childbirth.

WHO estimates indicate that satisfying the unmet need for family planning alone could cut the number of maternal deaths globally *by almost a third*.

Working closely with the Maternal Health (MH) and Family Planning (FP) divisions of Ministry of Health and Family Welfare (MOHFW), the United States Agency for International Development (USAID) through its Improving Healthy Behaviors Program (IHBP) is striving to address this crucial need through behavior change communications.

Two high profile campaigns will soon be launched for MH and FP for rural communities. Although both the campaigns will run across the country, the first phase targets the priority states—9 states for the MH campaign and 11 states for the FP campaign. **The eight EAG states common to both FP and MH campaigns are**—Uttar Pradesh, Uttaranchal, Bihar, Jharkhand, Madhya Pradesh, Chhattisgarh, Rajasthan and Orissa. Besides the eight EAG states, both campaigns will cover the state of Assam. The FP campaign will also be rolled out in Gujarat and Haryana.

The MH campaign focuses on priority behaviors to ensure safe delivery and the health of the mother. The FP repositioning campaign promotes at least three years of space between children by adoption of temporary methods of contraception by couples.

MOHFW is conducting a national level workshop for MH, FP and IEC officers from priority states on 29th and 30th October 2012 to prepare for state level roll out of the campaigns. IHBP team will facilitate the workshop in close coordination with MOHFW and support the state officers in developing comprehensive media plans in sync with the larger national media plan for dissemination of these campaigns.

Additional Secretary Health MOHFW Ms. Anuradha Gupta who is leading this initiative with assistance from USAID and IHBP said 'The workshop is a critical step towards the overall vision of this partnership to develop and disseminate strategic communication campaigns for the Ministry of Health and Family Welfare'

The USAID Mission Director complimented the gathering on the occasion and reiterated the need to build behavior change communication capacity for effectively sustaining such crucial campaigns.

Participants from 9 priority states where the Maternal Health campaign will be rolled out and 11 priority states in Family Planning are attending this two-day orientation and planning workshop at New Delhi.

###

Press Release Template

Ministry's name and logo

The release should be on official letterhead if possible.

For immediate release

This states when the information in the release can be published or broadcast. The heading can be replaced by "Embargoed until (release date and/or time)." Most journalists will hold the information until that date, but do not count on this.

Contact information

Gives the name, phone and fax numbers, and email address of the person whom journalists should contact for more information.

Headline

The headline is a short phrase that sums up the essence of the release. This runs under the contact information and above the body of the release.

Dateline: City, province, or district

Most news articles in newspapers begin with a dateline.

Body

- The first paragraph is called the lead. With the headline, it is the most powerful and important part of the release**.** The story's first sentence should provide the essential information and must capture the interest of readers.
- Who, what, where, when, and why must be covered—the supporting information.
- The use of quotes will put a human face on the news. Those used should substantiate the lead, be from a significant person, and add information. If possible, use a quote within the first few paragraphs.
- Keep sentences and paragraphs short. Use plain language and no acronyms or jargon.
- If the release has more than one page, type "—more—" at the bottom of the first page to signal its continuation on the next page.

###

(The symbol ### or "END" marks the end of the release, centered on the bottom on the page.)

Writing a Media Advisory

A media advisory is a one-page announcement of an upcoming event, and sent to journalists a few days before in the hope they will cover it.

A media advisory is shorter than a press release, but answers the same questions: **who, what, when, where,** and **why.** It may be helpful to refer the following template when composing a media advisory.

Media Advisory Template

Directions: Use this template to develop your media advisories.

Ministry logo

For release on: Day and month

Contact information

Title of Event

Dateline: City, province or district

Body: [Includes the five Ws]

What: Name of organization or program, event details

Why: So what? Why should people care about this?

When: Date and time

Where: Location and brief directions, if needed

Who: Organizational details, including list of key speakers

Link to the website of the program or organization

(to indicate end)

What to Do After Sending Out a Press Release or Media Advisory

After you have notified the media of an event, make sure you:

- Call the media outlets targeted a few days before the event to ask if it was received. If not, it can be sent again, perhaps to a different person, email address, or fax number.
- Ask is whether a journalist was assigned to cover the event and, if so, if he or she needs more information or would like to schedule an interview with the spokesperson designated by the program.
- Call the media outlets again on the morning of the event to find out what time journalists will arrive and whether they know where to park.

Developing a Media Kit

When holding events or discussing the program with media personnel, ensure that you have pre-packaged media kits available for distribution. A press release is the main focus of the media kit with additional background information on the program that will assist the media. When developing a media kit:

- Keep the information concise and easy to scan.
- If you are launching a lengthy report, include copies of the executive summary only.
- Avoid duplication of information.

Media kits, at a minimum, include:

- a press conference agenda
- a press release
- local, state, and national statistics about your issue
- background information
- biographies of your speakers
- reproducible copies of charts or graphs used in your speakers' presentations
- copies of other program materials or reports
- name and telephone number of someone who can be called to answer questions or verify information

Evaluate Media Engagement

Efforts to engage the media and improve coverage of a health area need to be assessed and followed up. Answering the following questions is a good way to start:

- *Did the media coverage increase?* How many stories were written about xxx? How many of these stories were written by journalists on the media list? Is this list being continually updated?
- *Were the main messages and points in the media plan accurately portrayed?* Did the news coverage reflect the contents of the media plan? Were messages and points understood? Or were they misunderstood and the focus lost?
- *What lessons were learned?* What should be done differently? What went well and what did not go well? Was the question "who cares" answered?

Examples of What Campaigns can Track
• Amount of time given to your health area/program • Print coverage and estimated readership • Number of speeches and presentations • Size of events • Size of audience at presentations and events • Number of telephone, email, and mail inquiries on campaign • Number of people visiting a website • Number of organizations, businesses, and media outlets participating in campaign events

Checklist – Final Review for Working with the Media

Conduct a Quick Assessment	
Understand the media.	☐ Understood what news media want from a story ☐ Knew what different publications, stations, and shows typically cover ☐ Established a system for monitoring news coverage (e.g., clipping newspaper articles or regularly listening to news broadcasts)
Compile a list of contacts.	☐ Developed a list of contacts in the news media ☐ Identified reporters who cover reproductive health issues ☐ Established relationships with media contacts
Develop a Media Plan	
Develop a media plan.	☐ Clarified goals and audiences ☐ Outlined key content and story angles ☐ Developed a list of proposed activities to engage the media ☐ Clearly outlined staff roles, policies, and procedures for interacting with the media, budget, logistical support, timing of events, and contacts ☐ Planned for revisions and updates for the plan

Engage the Media	
Select methods and review story to ensure it is interesting to the media.	☐ Selected appropriate methods to interact with the media ☐ Provided brand new information ☐ Used distinct of unusual information. ☐ Story was significant (e.g., the information concerns people/community) ☐ Story related to bigger issues, such as national health priorities ☐ The material inspired human interest, sympathy, or humor
Deliver the message strategically.	☐ Capitalized on breaking news that is related to your issue ☐ Involved the media as a partner from the start by, for example, including them in program stakeholder meetings ☐ Responded quickly to requests for information
Prepare supporting documents.	☐ Finalized and disseminated a press release and/or media advisory ☐ Developed media kit

Evaluate Media Engagement	
Monitor implementation.	☐ Established a system to review media plan ☐ Scheduled reviews to adjust the activities and schedule
Review outcomes of media activities.	☐ Evaluated media coverage, using the monitoring system (see Step 1) ☐ Tracked numbers of inquiries from the public ☐ Compared accomplishments with objectives
Provide continuity.	☐ Maintained frequent contact with the media personnel ☐ Thanked those who provided good coverage

Booklet I: Monitor your Campaign

Monitoring has many concrete benefits.

- Monitoring ensures that materials and media are distributed as planned.
    - e.g., after they are sent to the district government office, they are further distributed as directed in the community
- It ensures that materials are being used appropriately.
    - e.g., job aids are used and carried during ASHA counselling sessions and not left at home
- It ensures quality interpersonal communication (IPC) and mid-media activities.
    - e.g., regular field supervision occurs, checklists are used
- Monitoring can change the sites where the graphic material is displayed for greater effectiveness.
    - e.g., posters placed in a space where your audience will see it
- It can suggest broadcasts in other media and/or at more appropriate times.
    - e.g., if your audience listens to the radio at 11:00, air at 11:00

- It can delay the broadcast launch if a product has not been produced, has not been delivered, or is not available in all the promised sites.
- Monitoring can reshape training sessions.
    - e.g., if they are not delivering on their intended objectives
- Monitoring can prompt a change product prices.
    - e.g., if they are unaffordable to your audience
- It improves distribution systems.
- It changes elements of message strategy
- It allows for midcourse corrections of the implementation.
- Monitoring can shift internal workloads or responsibilities.

Contents

Monitoring your Materials

A materials monitoring plan should be incorporated into the overall program's M&E Plan.

Remember that materials do not stand alone, but are integrated and supported by a program's activities.

A materials monitoring plan should ask the following:

- What will be monitored?
    - e.g., What specific materials and activities will you monitor?
- What monitoring indicators and targets will be used?
    - e.g., How will you measure the quality and effect of the materials? What are the programs' goal in use and quality?
- What monitoring methods and tools will be used?
    - e.g., What methods will you use? What tools are needed to collect the data?

What are your Monitoring Questions?

The first step in developing a campaign monitoring plan, is to compile a list of materials and activities that the campaign will conduct. Then determine what to monitor and what questions you want answered.

The simplest monitoring is counting the number of materials disseminated and activities completed. This can be done through developing tracking templates. Think beyond just counting. As you determine what will be monitored, keep in mind the questions below.

What to Monitor	Example Questions to Ask
Logistics	• Is your campaign being implemented as planned? • Are the program components such as print materials and supplies being delivered on time, in the right place, by the right people, to the right audience? • This is the minimum level of monitoring required to ensure that efforts and money you have already expended are reaching the people and places at the times and with the quality your plans require.

What to Monitor	Example Questions to Ask
Distribution of Print Materials	• Are your materials placed where your audience can see and read them? • Have your materials reached their intended audience? • Are the materials being used? • Are audience members taking home the materials? • These types of questions can help you find out if materials are reaching the target audience in a timely and effective manner.
Mass Media Broadcasts	• Are the spots being broadcast at the specified time on the stations selected? • Is the mass media plan being followed by the stations? • Is the campaign reaching the intended audience? • To monitor mass media, specified people should listen or watch during the time slots contracted to determine whether the materials are being broadcast as scheduled.
Mid-Media Activities	• Are scripts being followed? • Are key messages consistent? • Are the target audience members attending these events? • Are the events being held according to the schedule location? • To monitor mid-media, develop questions and tools to ensure they are not only being implemented according to schedule, but that it is quality implementation.

What to Monitor	Example Questions to Ask
Exposure	• Are you reaching enough of the intended audience? • Has the audience been exposed to the campaign? • If your materials are not reaching your intended audience, consider another station, location, or channel.
Training plan	• Is the training on schedule, delivered as designed? • Training is time-consuming and expensive, so it must be done correctly.
Attitudes	• Is there evidence that there is a negative reaction to the campaign? • Is there evidence that people are tired of hearing about or are ignoring the campaign? • If there is message fatigue, you may want to change certain factors in your messages, or in your broadcast schedule.

Developing Process Indicators and Tools to Monitor

How will you measure process or quality of the materials and activities? Below are some sample indicators you can use to monitor your materials.

Measuring What?	Process Indicators
Logistics	• Number of campaign components implemented according to schedule • Number of materials delivered on time, in the right place, by the right people, to the right audience
Distribution of Print Materials	• Type of media source airing/disseminating material (such as print media, radio, TV, Internet) • Number of hoardings/posters disseminated in catchment area • Number of materials disseminated by peer educators, ASHAs by type (e.g., educational pamphlets)
Mass Media	• Time spot or program is aired • Extent to which a news release was covered accurately, positively framed, or strategically placed • Percent of target audience who saw/heard/read the material (PSA, news article, radio program, and so on) • Number of unique website page views of messages/material • Number of materials downloaded

Measuring What?	Process Indicators
Mid-Media Activities	• Number of activities where scripts are followed and key messages are consistent • Number of mid-media activities conducted as planned • Number of community members who participated in dialogues by session • Level of peer educator/ASHA/provider–audience interaction during contacts • Percent of target audience satisfied with peer educator/ASHA/provider contact • Ability of community members to access mid-media activities
Exposure	• Percent of target audience who saw/heard/read the material (PSA, news article, radio program, and so on) • Number of community members who participated in communication activity by session • Percent of the target audience who saw the billboards/posters • Number of unique website page views of messages/material • Percent of target audience who were able to recall the communication message of the health communication material/media (on radio, TV, billboard/poster, print material)
Training Plan	• Number of trainings implemented • Number of participants trained • Number of participants with increased skills/knowledge • Number of participants using or transferring skills

Template – Sample Materials Distribution Monitoring List

Name of Partner, Site, and Region:_____

Data Collector's Name and Title:_____

Date:_____

Material and Type	Language	Number received	Date received	Number still available	Location of material at site?	Used by?
Example: *Signs of High-Risk Pregnancy Pamphlet*	*Hindi*	*500*	*June 2013*	*200*	*Waiting room table; counselling room*	*Client*

Template – Community Outreach Data Form

Group Name: _____

Village Name: _____ Group Facilitator Name: _____

Session No (e.g., Session 1, 2, or 3): _____ Date of Event: _____

Time at start of event: _____ Time at end of event: _____

Topics Discussed (list out):

_____

_____

Names of Participants:

Note: Each community member participating in this outreach activity must sign his/her name in this form as proof that he/she took part in the outreach discussion. For participants who cannot write, facilitators are advised to fill in the form for those particular participants, except for the signature. Here this facilitator should request a participant to sign by using "x" as a signature.

ID.	Participant's Name & Surname	Age	Gender		New to outreach events	Participant's village	Participant's signature
			M	F			
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
…							
…							
20.							

Template – Sample Monitoring Questionnaire

District: _____ **Name of health facility/organization: _____** **Designation of respondent: _____**	
1. Have you ever received the *Family Planning Matters Pamphlet*?	1. Yes_____ 2. No_____ (Go to Q13) 3. Not sure_____
2. Have you ever received the *Family Planning Matters Pamphlet* in the following versions? (Write yes or no.)	a) Hindi_____ b) English_____
3. How do you receive the *Family Planning Matters Pamphlet* for your health facility/organization?	
4. Who is in charge of such materials here?	
5. How many times have you received the *Family Planning Matters Pamphlet*? (Ask according to response to Q2.) Write the number of times or "can't tell" for those who don't recall.	a) Hindi_____ b) English_____
6. When did you last receive the *Family Planning Matters Pamphlet*?	a) Month_____ Year_____ b) Can't recall

7. What were topics of the *Family Planning Matters Pamphlet* you received?	1. Family planning 2. Modern Contraceptives 3. Spacing
8. How many copies of the *Family Planning Matters Pamphlet* do you receive?	a) Hindi_____ b) English_____
9. How do you use the copies of the *Family Planning Matters Pamphlet* you receive here?	
10. Do you use them in any of your activities? If yes, mention the activities and how the papers are used.	
11. How long does it take you to distribute these copies to the target beneficiaries?	
12. Do you face any challenges when distributing or utilizing these papers?	1. Yes_____ 2. No_____
13. If yes, what challenges do you face?	
14. What do you think is the best channel or system to distribute the *Family Planning Matters Pamphlet* to reach its target audience?	
15. Do you have any suggestions to improve on the *Family Planning Matters Pamphlet*? (Probe for content, language used, paper layout, etc.)	

Template – Sample Radio Monitoring Sheet

Radio station: _____

Month/year: _____ **Name of monitor:**_____

Day of Week	Date	Duration of spot			Quality of Sound			Topic Discussed	In Media Plan (yes or no)
		Time Start	Time End	Total Seconds	Poor	Good	Excellent		

Promos run in the week

Day	Date	Time	Content of Promo

Remarks by monitor

Excerpt Survey from Recall Study of Mass Media Campaigns for Maternal Health and Family Planning in Uttarakhand State, India

Questions	Responses
In the past 3 months, have you seen, heard, or read anything about maternal health in the mass media or anywhere else? Cue/Probe: You may have seen, heard or read information on TV, radio, newspapers/magazines, hoardings, street play, cinema, theater, or informed by health care workers (ANM/ASHA) on maternal health.	Yes
	No

Questions	Responses
Please name all the channels or places where you saw, heard, or read any information on maternal health. For each channel not mentioned, the interviewer asks: Did you see, hear, or read any information on maternal health on any of the following channels or places in the past 3 months?	**Channel/Media**
	TV
	Radio
	Newspapers
	Magazines
	Hoardings / Banners / Posters / Bus Panel
	Cinema Theater
	Street Play
	Health Center/Hospital
	Market
	Community Hall/Panchayat Bhawan
	Play/Fairground
	Construction Site
	Bus Stop
	Wall of Public Building
	Health Care Workers (ASHA/ANM/AWW)
	Other(specify) _____

Questions	Responses
Please name all the maternal health topics that you saw, heard, or read. For each topic not mentioned, the interviewer asks: Did you see, hear, or read about any of these topics in the past 3 months?	**Health Topics**
	Antenatal check-ups
	4 antenatal check-ups
	Consumption of IFA tablets during pregnancy
	Consumption of 100 IFA tablets during pregnancy
	Institutional delivery
	48 hours stay at health facility after delivery
	Benefits of JSSK
	Eating healthy foods during pregnancy
	Taking rest during pregnancy
	Husband's responsibility towards pregnant wife
	Contact ASHA /ANM/reach hospital if you have danger signs during pregnancy
	Danger signs to look out for during pregnancy
	Others (Specify) _____

Questions	Responses
Where DID YOU SEE or HEAR any of the maternal health information THAT YOU JUST DESCRIBED? **Anywhere else?** Do not read out the options and multiple answers possible.	**Media**
	TV
	Radio
	Newspaper
	Magazine
	Hoardings/ Banners/Posters/Bus Panel
	Cinema Theater
	Street Play
	Health Center/Hospital
	Market
	Community Hall/Panchayet Bbhawan
	Play/Fairground
	Construction Site
	Bus Stop
	On Wall of Public Building
	Health Care Workers (ASHA/ANM/AWW)
	Others(specify) _____

Questions	Responses
Do you remember the tagline of the message on maternal health that you saw or heard?	Yes
	No
If yes, what was the tagline of that advertisement? Write all taglines they may say.	*Chance kyun lena hain*[1]
	Others (specify): _____
In the past 3 months, have you seen, heard, or read about an advertisement on "*chance kyun lena hain*" (why take a chance)?	Yes
	No

[1] This is the campaign tagline. It means, "Why take a chance?"

Questions	Responses
Please name all the channels or places where you saw, heard, or read about this tagline: "*chance kyun lena hain*" (why take a chance)? For each channel not mentioned, the interviewer asks: Did you see, hear, or read this tagline on any of the following channels or places in the past 3 months?	**Media**
	TV
	Radio
	Newspaper
	Magazine
	Hoardings/ Banners/Posters/Bus Panel
	Cinema Theater
	Street Play
	Health Center/Hospital
	market
	Community Hall/Panchayet Bhawan
	Play/Fairground
	Construction Site
	Bus Stop
	On Wall of Public Building
	Health Care Workers (ASHA/ANM/AWW)
	Others(specify) _____

Questions	Responses
Please name all the maternal health topics that you remember connected to this tagline: "*chance kyun lena hain*" (why take a chance)? For each topic not mentioned, the interviewer asks: Do you remember any of these topics being connected to the tagline?	Antenatal check-ups
	4 antenatal check-ups
	Consumption of IFA tablets during pregnancy
	Consumption of 100 IFA tablets during pregnancy
	Institutional delivery
	48 hours stay at health facility after delivery
	Benefits of JSSK
	Eating healthy foods and taking rest during pregnancy
	Husband's responsibility to pregnant wife
	Contact ASHA /ANM/reach hospital if you have danger signs during pregnancy
	Danger signs to look out for during pregnancy
	Others (Specify) _____

Questions	Responses
To what extent do you feel that the ad has motivated you to take action about maternal health? Would you say it… Read out the 3 statements that are in the column to the right. Do not read dk/cs option.	Motivates you a lot to take action
	Motivates you to a certain extent to take action
	Does not motivate you at all to take action
	Don't Know/Can't Say (DK/CS)
What action do you intend to take? Record verbatim and multiple responses.	Intend to find out more about my responsibility as spouse
	Intend to discuss maternal health with my spouse
	Intend to discuss maternal health with my mother/mother-in-law/friends/relatives
	Intend to discuss maternal health with health workers
	Intend to visit a doctor/ASHA/ANM/hospital for more details
	Intend to utilize health facility/program in future for maternal health care
	Others (Specify) _____

Questions	Responses
Why did the advertisement not motivate you to take any action at all? Record verbatim and multiple responses.	Maternal health services cost too much
	Accessibility to health facility is the major problem in seeking services
	Not interested in seeking maternal health services
	Don't have enough time to concentrate on messages
	Others (specify)_____
To what extent has the ad provided you with any new information on maternal health? Would you say it … Read out the 3 statements which are stated in the column to the right Do not read dk option.	Gave new information to large extent
	Gave new information to a small extent
	Did not give any new information
	Don't Know
After watching/hearing the	Complete 4 ANC visits

Questions	Responses
advertisement what do you intend to do? Multiple responses.	Consume 100 IFA
	Eat healthy during pregnancy
	Take sufficient rest during pregnancy
	Be aware of danger signs during pregnancy
	Be aware of husband's responsibility during pregnancy
	Avail self of benefits of JSSK
	Go for institutional delivery and 48 hours stay
	Ask my husband to accompany me for my next ANC
	DK/CS
	Others (Specify) _____