

# FOCUSING & DESIGNING

MODULE

012345

A LEARNING PACKAGE FOR SOCIAL AND BEHAVIOR CHANGE COMMUNICATION

FACILITATOR'S GUIDE

# **C-Modules: A Learning Package for Social and Behavior Change Communication**

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Version 2**

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# Proposed Workshop Schedule

<b>Day 4</b>
<b>Review of Yesterday's Learning</b>
<b>Module Two: Overview</b>
<b>2-1 Communication Strategy</b>
<b>2-2 Audience Segments, Priorities, and Profiles</b>
<b>2-3 Barriers ~ Matrix for Change</b>

<b>Day 5</b>
<b>Review of Yesterday's Learning</b>
<b>2-4 Communication Objectives</b>
<b>2-5 Strategic Approach and Positioning</b>
<b>2-6 Channel Mix ~ Creating an Environment of Change</b>
<b>2-7 Draft Implementation Plan</b>
<b>Teamwork and Coaching: Communication Strategy</b>

<b>Day 6</b>
<b>Review of Yesterday's Learning</b>
<b>2-8 Draft Evaluation Plan and Baseline Indicators</b>
<b>2-9 Refining your Communication Strategy continued:</b> Team Sharing: Communication Strategy <ul style="list-style-type: none"><li>• Gallery walk</li><li>• In-depth feedback</li></ul>
<b>Closing of Module Two/Preview of Module Three</b> Crosscutting principles of SBCC
<b>Your midpoint feedback on this workshop</b>



In the 2-part option for this course, Module Two spans 2 ½ days. Midday on day three a team sharing exercise takes place to show the culmination of participants' work on Module Two.

### Objectives:

By the end of this 2½ day module, you will have:

- used the results of your initial research/situation analysis to outline a complete strategy for your SBCC effort
- segmented and prioritized audiences
- created communication objectives (for each audience segment) based on obstacles to change
- decided on your main key strategies (advocacy and/or social mobilization and/or behavior change communication)
- suggest a mix of communication materials and activities to achieve objectives with each audience

### Recommended worksheets, examples and graphics for this module

- Large Graphic of C-Planning – Step 2 (Session 1)
- Communication Strategy Outline (Session 1)
- Checklist: Audience Segmentation (Session 2)
- Checklist: Audience Prioritization (Session 2)
- Worksheet: Audience Segmentation Map (Session 2)
- Worksheet: Audience Profile (Session 2)
- Graphic: A Socio-Ecological Model for Change (Session 3)
- Worksheet: Matrix for Change (Session 3)
- Worksheet: SMART Communication Objectives (Session 4)
- Worksheet: Strategic Approach (Session 5)
- Worksheet: Positioning (Session 5)
- Worksheet: Channel Mix (Session 6)
- Worksheet: Deciding on Channel Mix (Session 6)
- Worksheet: Channel Selection (Session 6)
- Worksheet: Draft List of Products, Materials and Activities (Session 6)
- Worksheet: Scenario to Create and Environment of Change (Session 6)
- Worksheet: Draft Implementation Plan (Session 7)
- Graphic: Where M&E Fits into SBCC (Session 8)

# Overview

Begin each day with the report team leading a session about **Yesterday's Learning**. Make sure this time is used to clarify any confusing or “hanging” issues from yesterday. We estimate 30 minutes per day for Yesterday's Learning.

- Locate Step Two in the C-Planning Graphic and clarify the purpose of this step in the process.
- Review posted objectives for Module Two and how the agenda will accomplish these objectives.
- Each day, remind each other of the volunteered roles for today (i.e., a timekeeper, a report team, a logistics support team, etc.).



If you are using this learning package over time, participants may have gone back to their worksites after Module One. If this is the case, you will want to include an opening to Module Two during which project teams review the insights they took from their previous situation analysis. They can use the worksheet from the close of Module One to summarize and present their refined analyses. Each team should have a problem statement, including the Change this Problem Calls For. If they had time back at their sites, they may have addressed some of the Research Gaps named in Step One. They are ready for Module Two.



In the SAT course, a report team from Zimbabwe planned and led a Yesterday's Learning session that involved everyone, challenged our recall, and got everyone smiling.

In a circle, they taught a simple tune “I remember...”  
And began a chain of verses in which people took turns naming a thing they remembered from yesterday's learning.

### Session 2-1: Communication Strategy

In plenary, review where Step 2 is in C-Planning, then take a holistic look at the **strategy outline overview**. Notice how the different parts flow into and inform each other and discuss:

- *What part of this outline will be new to you?*
- *What parts are you already familiar with?*

In small groups study the complete **example: communication strategy** from the *Practitioner's Handbook* and discuss:

- *Where do you see each part of the strategy outline we just reviewed?*
- *What do you notice about how the different parts of the outline fit together or influence each other?*
- *What are your questions about a communication strategy before we examine it part-by-part?*

Come back to the plenary and share your insights and questions.

Step Two of SBCC planning, like all others steps, requires practice, gut instinct, and creative thinking. The tools provided can help participants to be systematic and comprehensive. But, these steps should not be used as a formula. As you walk participants through this process, encourage them to listen to their intuition and to keep an eye on the bigger picture of change.



The strategy outline in the handbook includes a sample summary analysis, a communication strategy, and draft implementation and evaluation plans. The focus of this module is on the communication strategy. As facilitator, feel free to substitute another example from your own experience. The key is to show how the communication strategy drives the rest of the planning—it establishes audience segments and communication objectives. In the next module, participants will learn about creative briefs, which are developed for each audience and are an objective of an SBCC effort.

## Session 2-2: Audience Segments, Priorities, and Profiles

In plenary study the description of **audience segments, priorities and profiles** in the *Handbook*. Exchange ideas about what it means to segment audiences and why you have found this useful in the past. Be as specific as possible by naming examples of programs you've worked on or know about that segmented audiences. In plenary, review the **example: audience segmentation table** in our and discuss:

➤ *What is useful for you here?*

Look at the four criteria in the **checklist: audience segmentation**. Watch this visualized presentation of an audience segmentation map using one project example.

Use the **checklist: audience prioritization**. In order to make tough decisions about segmenting to prioritize in your SBCC effort, consider partners with whom you might work with to maximize the scope of your programming.



In project teams (with coaching) work on your own audience segmentation and prioritization. Share your work.




One way to convey the idea of audience segmentation is to hold an interview in the room with somebody who has insight into a particular audience. For example, in South Africa we worked with a female participant who represents a national network of PLHIV in her country. We role played an unscripted interview during which she described the many different subgroups of PLHIV in her country. As she spoke, the co-facilitator illustrated the differences she named and connected them back to four sets of criteria for segmenting audiences (provided in the *Practitioner's Handbook*). Participants said they found the exercise very useful as a way to visualize the variety of people within what we might, at first glance, consider to be a single audience.




## STEP 2: FOCUSING & DESIGNING

As time allows, come back to plenary and conduct an exercise demonstrating audience profiling. This exercise is called “Whose Life”<sup>1</sup> (IDEO)

- Work in small groups of five
- Review the contents of three handbags or pant pockets from unidentified individuals in the plenary. Without knowing who the person is, try to determine what sort of personal, professional, emotional life the person has.
- Draw an audience profile based on this exercise.

 Return to your project teams and develop your own audience profile using the **worksheet: audience profile**. Share and read them aloud to other teams. Invite colleagues from other teams to point out possible assumptions that appear in your profiles.

 You may find participants stereotyping audiences, largely as a result of participants being rather distanced from their actual audiences. If time allows, explore with participants how they can get to know their audiences better; namely, by spending time with audiences and/or drawing in audience members to work more closely with the team.

You can try the “Whose Life” exercise. The benefit of this exercise is it that usually discourages negative stereotyping; unfortunately, you will only work with the contents of someone’s handbag or pants pocket, and not your real target audiences

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<sup>1</sup> Daniel H. Pink. *A whole new mind: Why right-brainers will rule the future*. (New York: Penguin Group: 2006)

### Session 2-3: Barriers

Look together at the next two sections of a communication strategy. Note that one of the most important aspects of this approach to SBCC is the creation of communication objectives that directly address real barriers faced by audiences. Developing crisp and realistic communication objectives will not only focus the strategy, but will also allow you to measure success.

**The Socio-Ecological Model** can help us define barriers faced by the audience. Put yourself in the mindset of each audience segment. If you have audience profiles, use them to help you see the world through the eyes of that particular audience. *Contemplate the various rings influencing them. What is most critical here: motivation, skills, values, norms, policies, products, or services? How do you know?*



Study the **example: matrix for change** and work in project teams to create a matrix of your own using the **worksheet: matrix for change**.

- *What barriers seem most significant to you? What are the implications of that for your program?*
- *What opportunities do you see for change? How can your program tap into those opportunities*

As always use your own examples if you prefer them to the ones in the *Handbook*. Coach the teams as they develop their matrices for change. We suggest that each team create the matrix for at least TWO audience segments (in different rings of the model). In other words, make sure that they look at an audience most affected and/or an audience influencing directly and/or an audience influencing indirectly. This will ensure that their strategy will be multidimensional and not confined to one of the three main strategies of SBCC.

Note that participants will look at obstacles to change in order to develop communication objectives, AND they will look at obstacles again in the creative briefs as a basis for message development.



You can expand on this task and use it instead of the audience profile exercise above. Or, you can use it to enhance the audience profile and focus people's attention on the real obstacles that get in the way of positive change. Either way, we suggest choosing one example, from among the projects in the room, for the whole group to work with.

### Energizing the Learning

During the field test of this course with the Southern African Trust (SAT), we used an energizer called Deer-Hunter-Wall<sup>2</sup>. We introduced it on Day Two and came back to it every few days as an ongoing competition between men and women in the group. Everyone enjoyed it, including the facilitators who were eager to see which group would have the higher score at the end of each round. These kind of competitive energizers keep momentum going over a multiday workshop.

After the session on Barriers, we did a modified version of the deer-hunter energizer to connect it directly to the learning. A wall represented real barriers to change; a gun represented an ineffective effort to shoot through the wall; and a deer represented communication objectives that strategically navigate themselves over the barriers. We encourage you to be creative when linking the energizers to the learning in some way.

In addition to energizers, we encourage you to energize the learning tasks throughout the workshop in any number of ways. Here are just a few ideas<sup>3</sup>:

- Walk about: At initial stage of group work, pose a question to the group and invite them to take a walk—either inside or outside—as they contemplate the question.
- Rotating Plenary: Energize and create a more informal set-up by circulating the plenary to all the workspaces of group work, be they on the wall, on the ground, on a table, or in a circle or in clusters of chairs.
- Move your own orientation toward the group by switching where location of the front of the room.
- Ask participants to stand up and huddle around a visualized presentation for discussion in “standing plenary.”
- Ask everyone to stand and walk across the room, talk with a participant with whom they haven’t talked much, and continue the session from that new place.



To conduct the Deer-Hunter-Wall exercise – divide the room into two teams. Have each team discuss if they will pick the deer, hunter, or wall. Have the two teams face each other and have the teams present their choice simultaneously. In this energizer:

- The deer jumps over the wall
- The hunter shoots the deer
- The wall stops the hunter



<sup>2,3</sup> Salas, Maria, Hermann Tillmann, Neill McKee, and Nuzhat Shahzadi. *VIPP: Visualisation on participatory programmes: How to facilitate and visualise participatory group processes* (Dahka, Bangladesh: UNICEF, 2007).

# Session 2-4: Communication Objectives

In plenary, review the meaning and purpose of communication objectives. Examine the Socio-Ecological Model again and review the **examples: communication objectives that address different rings of influence and tips for SMART communication objectives**.

Working in small groups of three, discuss:

- *What do you find particularly useful about writing SMART communication objectives?*

Bring your insights and questions back to the plenary.



In project teams, use the **worksheet: SMART communication objectives** to develop communication objectives for your own project. You only need a sample of objectives, not an exhaustive list right now. Get feedback on your objectives and refine them until you are satisfied. We'll return to these when we look at baseline evaluation shortly.



If possible, we suggest talking with participants before this session and identifying one or two project teams who are ready to volunteer sample objectives that they worked with before coming to this workshop. Most likely, you'll find a mix of broad program objectives, which you need to help breakdown into communication objectives. Work with these examples to illustrate the characteristics of SMART communication objectives described in the *Handbook*. Emphasize that communication objectives are written per audience, address obstacles to change, and that form the basis for development of materials and activities in the next module

## Session 2-5: Strategic Approach and Positioning

Take a walk over to the large graphic showing the **three key strategies of SBCC**. As you contemplate the graphic, listen to these words:

*When we analyze situations fully, we realize that change takes much more than individuals making decisions to or learning to do things differently. Change almost always requires a movement for change by communities of people around the individual and requires many kinds of support within the broad environment in which the person lives.*


*BCC, social mobilization and advocacy are key strategies of SBCC that work together to bring about change at all of these levels: the individual, the community, and the environment.*

When you completed your problem statement, you named changes the problem calls for. Now, it's time to look at those proposed changes more closely (e.g., by audience) to arrive at a coherent strategy for change that addresses the best "tipping point" for change. In plenary, review the definitions and **example: strategic approach**.

Pair with someone from another project team and interview each other, asking:

- Which strategic approach do you think would be best to achieve your Communication objectives?
- Which one provides the best "tipping point" for change?
- How doable do you think this approach is given available resources?

As time allows, review the description and **example: positioning**. Remember: Positioning is presenting an issue, service, or product in such a way that it stands out from other comparable or competing issues. In the minds of your audiences, what would be distinct and attractive about the changes you are promoting?

 In project teams, use the **worksheet: strategic approach and positioning** to define your own strategic approach and position. Remember, the approach is what shows how all the elements of your program will fall into place to achieve change. As time allows, note some ideas for positioning and obtain input from the facilitators.



To help participants understand more about framing their strategic approach, here is a visualized presentation on framing that worked well during field tests. Use a similar picture to the one below and ask the participants to think about:

- What do you zoom in on? What is the focus?

Is it the trees (people), the house (services), the mountains (policy) or a cross section of one or more of these?



## Session 2-6: Channel Mix

In plenary, examine the range of possible **communication channels, materials, and activities**. Exchange ideas on the relative advantages of each and how they can reinforce each other.

- *What are your questions? What tips would you add from your own experience?*

Study the **worksheet: channel mix** and study the **worksheet: deciding the right channel mix** to assess the three main channel types and their potential for reaching the target audience.

Study the **example: channel selection tool** as a way to identify the best times and locations for reaching audience members. Individually walk through a typical day or week for you. Jot down on the **worksheet: channel selection** what communication materials or activities might best reach you at different points in time throughout your day. Share your insights in plenary:

- *What does this say to you about reaching audiences at ideal times and locations?*

Note that data on the media preferences of your audience help to make the final decision (e.g., Steadman in East Africa).

Read through the **example: environment of change scenario** in the *Handbook*.

Debate:

- *Who are the primary, secondary, and tertiary audiences in this project?*
- *What strategies are used here? What seems to work well?*
- *Do you consider this to be SBCC? Why?*



As time allows, consider the final part of the communication strategy: *What are the key content points to be communicated through each channel for each audience?* Check if those channels make the most sense and then finalize your decisions. In project teams, work with a coach while using the **worksheets: draft list of products, materials, and activities** provided in the *Handbook* to draft a channel mix for your SBCC effort, focusing on at least two audiences and objectives. As time allows, draft key content in bullet points for one material or activity.



In the 3-part option for this course, you'll have more time to delve into this session on channel mix. If time allows, you may have each team develop their own "environment of change" scenario as a way to help them envision how materials, products, and activities work together to reach audiences. In the field test of this session with SAT, we used a silent role play to illustrate the power of the channel mix. Create cards, each naming one audience member as s/he shows up in the story. Distribute the cards among a sample of participants in the workshop and ask them to each stand when their role is mentioned in the story. As you narrate the story, everyone can see how the different channels work to reach people and to create an environment of change.

If the participants would like more information on Entertainment-Education, you can provide them with the following reference. INFO Reports. *Entertainment Education for better health*. January 2008: No. 17.  
<http://info.k4health.org/info-reports/E-E/E-E.pdf>

## Session 2-7: DRAFT Implementation Plan

In plenary, come look at the C-Planning graphic. Notice that Step 4 is devoted to implementation. But, we don't want to wait until Step 4 to draft an implementation plan, because if you think about it now it helps you to:

- Be realistic about the resources, people, and time you'd need to implement your strategy as you have now outlined
- Begin to secure the resources, people, and time you do need so that you can effectively implement this strategy

Consider the **example: implementation plan**, focusing on the draft implementation plan.

- *If you were a manager for this program, what would concern you about implementing this effort? Why?*
- *What might you do to address the concerns?*



In project teams, use the **worksheet: draft implantation plan**. Swap your plan with one other team and review theirs, asking:

- *If you were a manager for this program, what would concern you? Why?*
- *What might you do to address it?*



Remind participants that this is a great time to think again about partners, allies, and gatekeepers so that you can begin to build the relationships needed to make your strategy a success. Input from partners, allies, and gatekeepers at this point also helps to make sure you are using your resources most effectively. If time allows, in the 3-part option for this workshop work with teams to name partners who they would actively include in their draft implementation plan.

# Session 2-8: Draft Evaluation Plan and Baseline Indicators

In plenary, note the timing of the baseline research here in Step 2 for C-Planning. The communication objectives created earlier in this session are an essential starting point for your evaluation.



The depth of this session will depend very much on the schedule you have determined for this course. For example, if you are doing the 3-part option of this course, participants are about to go back to their sites to do baseline research. In this case, it would be wise to devote a fair amount of time to this session. Worksheets for all the following steps are found in Module 5:

- Define uses and users of the data;
- Draft a research design;
- Use SMART objectives to draft indicators;
- Decide on methods and tools for the research;
- Draft a plan for analyzing and sharing the baseline data.

At a minimum, make sure that all groups examine the use and users of M&E data, and make informed decisions about whether and when to do a baseline study.

# Session 2-9: Refining Your Communication Strategy

Each project team is asked to complete their final assignment for Module Two, as described in the *Handbook*. Facilitators support the teams in the completion of their draft strategies and in creating a visual through which to present their work to other teams. We recommend a gallery walk so that all teams can celebrate each other's work, and then a more focused feedback exchange among project teams using the traffic sign technique, as described at the close of Module One.

All the project teams are bound to be at very different places right now in terms of their communication strategies: some will need quite a bit of guidance in order to get a coherent strategy drafted; others will be refining it. The goal is for each project team to have named at least two audience segments and two communication objectives for each segment before they present their strategy to colleagues for feedback. More advanced teams can expand their strategy for additional audiences and/ or build on what they have by thinking through communication channels (i.e., products, materials, and activities) for each audience and by drafting content.



The final part of a strategy outline includes a draft implementation plan and draft evaluation plan. In the 3-part option for this course, you will likely have time to work on them.



However, in the 2-part option we suggest that you simply:

- call these plans to the participants' attention;
- explain the draft implementation plan outlines aspects of the program will be monitored; and
- explain that the draft evaluation plan allows you to coordinate and gather baseline data, as needed, before moving on in the process

You may refer participants to the handbook for additional reading and explain that a lot of this content will be picked up during the training in Step 5.

## **Team Sharing**

Below is the project team assignment for the close of Module Two. Review it in plenary for clarity and allow ample time for the groups to prepare a visual aid that they will present to their colleagues.

### **Final Team Sharing for Module Two: Focusing and Designing**

Your team will present a communication strategy. Include:

- Segmentation of at least two audiences
- Desired changes by audience
- The obstacles which your audiences face with regard to the changes
- Communication objectives addressing these obstacles (for at least two audience segments)
- Strategic approach—across objectives
- Draft positioning and key content ideas
- Possible channel mix for two communication objectives

*Keep your attention on at least two key strategies of SBCC: behavior change, social mobilization, and/or advocacy.*

## Closing

The steps of C-Planning should reinforce the fundamental principles of the work—not draw our attention away from them. In fact, if you keep the principles in mind—and take some liberties with the steps and tools—you may still end up with a powerful program!

Wander around the room and pick up one of the principle cards from the floor that captures your attention right now. Move into small groups (with people you have not worked with much so far) and exchange ideas on the following questions:

- *Why did this principle call your attention now?*
- *What's something you'd like to learn or practice related to this principle?*

Join in on a midpoint feedback for our course. The purpose is three-fold:

- 1) to get your feedback on the learning process;
- 2) to determine what SBCC skills or concepts might need to be addressed further or differently; and
- 3) to give participants a structured opportunity to assess for themselves what they have taken from this course so far



You might be doing a 2-part option for this course (i.e., continuing tomorrow with Module Three).



3-part option (i.e., taking a break, during which participants return to their sites before continuing with Module Three).

If you are doing a 3-part option, you would close this part of the workshop with feedback from participants, and then giving assignments to participants so that they continue to work on their SBCC efforts on-site before returning for Module Three. Either way, we highly recommend doing a midpoint evaluation now.



There are many ways to get midpoint feedback from participants. The Human Scale is one technique we found very useful. Make a line on the floor to represent a scale with markings from 0% to 100%. Ask participants to stand along the continuum to show how confident they feel with regard to a particular skill or concept that we've explored in the course so far. Your list might include, for example: a problem tree; a people analysis; the Socio-Ecological Model; using existing research; audience segmentation; and communication objectives.

After each skill or concept is named, wait until participants have placed themselves and then open up a dialogue to discuss why they chose that particular place on the continuum. A co-facilitator can take notes, quoting participants' insights into SBCC and highlighting where there is confusion or debate. The facilitators can use these notes when planning subsequent days of the workshop, and invite participants to do further reading or exploration to bring back to the group.