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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

## Day 7

### Module Three Overview

#### 3-1 Getting Ready to Create:

Inventory of Existing Materials and Activities

#### 3-2 Creative Briefs

#### 3-3 Effective Messages



For the **3-part option**, the participants come back for Modules Three and Four. Please spend some time reviewing their on-site application assignments and the Introductory Module and Modules One and Two.

## Day 8

### Review of Yesterday's Learning

#### 3-4 Drafting of Materials and Activities

#### 3-5 Concept Testing, Reviews and Pretesting

#### 3-6 Finalizing Designs and Getting Ready for Production

Teamwork and Coaching: Creative Briefs

Team Sharing: Creative Briefs

#### Closing of Module 3/Preview of Module 4

### Objectives

By the end of this one ½-day module, you will have:

- Chosen one material or activity needed to accomplish one of your communication objectives with one of your audience segments
- Drafted a creative brief for that material or activity, including a including the message brief (promise and support statement), tone and key content for the material, and other creative considerations
- Used a storyboard technique to draft story-based materials
- Drafted a plan for a material review and pretest

### Recommended worksheets, examples and graphics:

- Large Graphic of C-Planning – Step 3 (Session 1)
- Worksheet: Research Gaps – (Session 1)
- Worksheet: Inventory of Existing Materials (Session 1)
- Worksheet: Analyzing Examples of SBCC Materials (Session 2)
- Worksheet: Creative Brief (Session 2)
- Worksheet: Effective Messages (Session 3)
- Checklist: Basic Principles of Message Development (Session 3)
- Checklist: Drafting Materials (Session 4)
- Worksheet: Storyboard Outline (Session 4)
- Checklist: Stakeholder Review (Session 5)
- Checklist: Audience Pretest (Session 5)
- Checklist: Quality Messages and Materials (Session 6)
- Checklist: Draft Production Timeline (Session 6)

# Overview

Kick off today, and everyday, with the report team leading a session about **Yesterday's Learning**. Make sure this time is used to clarify what is confusing or "hanging" from yesterday. We estimate 30 minutes per day for this.

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

This module works best if the facilitator has brought both his/her own examples of communication materials of any type AND has gathered some examples from participants.

We know using actual participant materials as examples to teach new concepts can be tricky for facilitators. It is a challenge to preserve participants' safety in the group and affirm their work, while simultaneously using their work as learning examples for the whole group. Here are three ideas to do this effectively:


- 1) On the day before beginning this module, tell participants that the best way to learn about material and message development is to wrap our heads around real examples. Invite volunteers to offer their examples to you the night before. Ensure them that feedback will be affirming and productive.
- 2) If you see a material that would work well, privately ask individuals or the team for permission to use one of their materials in the group. Explain why you'd like to choose their example.

If an example has been offered, make sure it's been reviewed beforehand so that you can use it to illustrate something positive (i.e., a clear audience) as well as something new (i.e., a call to action).

## Session 3-1: Getting Ready to Create

In plenary, study the description of **getting ready to create** and its place in C-Planning. Everyone name one communication product of any type (e.g., a poster, a training manual, etc.) that you have worked on in the past that covers any of the health topics being addressed by this group. Notice how, even in this room, quite a bit of time and resources have gone into the production of communication materials.

Take a moment to review your previous work using the **worksheet: Research Gaps** to help you track the gaps you identified in the initial research (Module One) and your strategic guideline (Module Two).

 Now, in project teams, begin to use the **worksheet: draft inventory of existing materials**. Focus your inventory on materials that might already exist on the topic you are addressing or which cover a different topic. Consider these questions so that you can help avoid mistakes and spend resources effectively:

- *Which of these activities, tools, or materials are still in use and why?*
- *What can we use or adapt for our purposes before reinventing the wheel?*
- *What can be learned from others in the field?*



If you are doing the **2-part option** for this course, you would have opened Day One with a marketplace in which participants share with each other highlights of work they have been involved with recently. As part of this sharing, they may have exchanged sample materials. This inventory can serve as a reminder of projects and materials already shared.



If, however, you are doing the **3-part option** for this course or giving this module as a stand-alone, we highly recommend investing time in a marketplace exchange with the following goals in mind:

- 1) Remind everyone of the wealth of experience in the room,
- 2) Give people concrete ideas for materials they may want to use or adapt, and
- 3) “Feed” the facilitators concrete examples of materials to which you can refer throughout this module.



## Session 3-2: Creative Briefs

Divide the room into two groups and review the definition and purpose of a creative brief as described in the *Practitioner's Handbook*. Notice the close relationship between the strategy outline and the brief. Study the **overview of the creative brief**. Discuss the following:

- *What part of the creative brief looks especially challenging to you? Why?*


Review the **Ethiopia example: creative brief for client self-management materials**. Imagine that you were tasked to draft the messages and materials described in the example creative brief.

- *What parts of the creative brief do you find particularly useful? Why?*

Return to plenary and exchange ideas about what you found particularly useful in the example creative brief.

Working Backwards: Take a look at these examples of materials/tools for change. As a group, discuss:

- *What would you say was the audience and objective for this material?*
- *What barriers might it address?*
- *Could you name the promise or call to action, the lasting impression the makers of the materials were striving for, or the perception of a person who has changed?*
- *What do you see as key content and tone?*
- *What else would you say was a creative consideration for this material?*

 In project teams, select one material or activity on which you agreed upon in your strategy. Make sure you are absolutely clear about the audience for the material/product. Also, be confident about the objective and the barriers it addresses. Now you are ready to complete a creative brief for that product using the **worksheet: creative brief for material/activity**. Highlight the parts of the creative brief that respond directly to what you discovered in the previous steps of C-Planning.

Present your DRAFT creative brief to one other project team in this course. Get feedback by asking questions such as:

- *In what ways does this creative brief respond to the strategy?*
- *What else might be added to the creative brief so that it becomes a very useful, written reference for the designing and testing of the material/tool?*



If time allows, you may want to remind participants of the wide variety of possible materials, and of the products reviewed in the Practitioner's Handbook Module 2. Encourage them to be creative in the selection of a material type and to not always "default" to the most common posters, fliers, etc. They might reconnect with their audience preferences by answering the following questions:

- *What will your audience really read, watch, or listen to?*
- *Where will they read, watch, or listen to it?*
- *One-time or long-term use?*
- *How will it be distributed?*
- 



We found that participants really engage in the "**working backwards**" activity, in which you show them a communication material and ask them to guess what the designers had in mind in terms of audience, objective, promise, etc. We HIGHLY recommend doing this activity in phases, so that you begin with looking only at the first parts of the creative brief. Then you come back to the same examples to examine more "subtle" aspects of the material, such as "promise, call to action or lasting impression." It is best if you can get a variety of examples together (yours or the participants'), so that you are not solely looking at posters or other one-way communication materials.

## Session 3-3: Effective Messages

In plenary, review the middle part of a creative brief: the promise, support statement, and call to action. This part can be referred to as the **Message Brief** because it gives birth to the message which will stand out in your material, and it may often appear in a number of materials designed for a particular audience and objective.

Work in groups of three and think back over the last week of each group member's life.

- *What communication materials have you seen or heard that caught your attention? Why?*

Review the **worksheet: effective messages** discussing the 7 Cs of effective communication, as outlined in the *Practitioner's Handbook*. Which of the 7 Cs appear to be honored in the example communication you named? *For example, was there a call to action? If so, what made it so memorable for you?*



Work in project teams to **develop a draft message for your project or refine an existing message**. Each person in turn has 10 minutes to explain and develop one message for their project, with feedback from the others using the creative brief "Benefit and Support Statement." At the end, everyone should be able to articulate: what your project does, who your intended audiences are, and what the one message is you want to communicate to your intended audiences. Make sure you review the **checklist: basic principles of message development** as you draft your messages.

If the participants would like more information on Effective Messages you can provide them with the following reference. Goodman, Andy. "Why bad ads happen to good causes: and how to ensure they won't happen to yours", (2002). Available at: [http://www.agoodmanonline.com/bad\\_ads\\_good\\_causes/index.html](http://www.agoodmanonline.com/bad_ads_good_causes/index.html)

## Session 3-4: Drafting Materials and Activities

In plenary, review the ideas about how to use stories as outlined in the *Practitioner's Handbook*. In small groups of three, briefly share any examples you can think of that describe how you've used stories to help create or structure a communication material.

In plenary, look at the example of a story board, as described in the **worksheet: storyboard outline**. You will practice creating a storyboard now. In the same trios, decide which person will tell a True, Personal story about an event through which he/she became a good communicator. As this person tells his/her story, one other person will jot down words to capture highlights of the story in three parts: a beginning, middle (high point), and end. The third person in the trio will illustrate the picture as he/she hears it, clarifying details as needed with the storyteller.

The work should be done quickly—perfection in picture is NOT what we're looking for. Rather, capture in three pictures the essence of the story and highlight it, if you like, with words. Use the **checklist: drafting materials** as a guide.

After no more than 10 minutes, invite all groups to post storyboards. The whole group listens to each story as narrated by the storyteller.

In plenary, note:

- *What was useful about the storyboard approach? What was difficult?*
- *How might you see yourself using this approach in any number of ways in the development of communication materials?*



If time allows, exchange additional tips regarding material development. Feed the discussion by pulling from this section of the *Practitioner's Handbook*, as well as from the rich experiences of those in the room.

You may want to use a fish bowl technique, in which half the group faces the other half in two concentric circles. The outer circle rotates one person at a time, so they can glean insights from colleagues and share their own experiences. Keep the circles rotating in the opposite direction until each participant has had a chance to exchange Material Development tips and experiences with at least four other participants.



After teaching the storyboard technique, you may want to emphasize a few principles for use of stories in the development of communication materials. For example, you might suggest that participants:

- establish relationships with audience members
- gather true (not fabricated) stories
- ensure that the stories are representative (that others can relate to them)
- explore a variety of uses for stories across a mix of materials/activities

## Session 3-5: Concept Testing, Reviews, and Pretesting

In plenary review the information provided on concept testing, review and pretesting. Imagine that you are working on a project that is about to invest a large amount of time and resources in the development of materials. As you listen to a brief description of the project, ask yourself these questions:

- *With whom might you do concept testing? When, and how?*
- *Who would you include in a stakeholder review? When? How?*
- *With whom might you pretest draft materials? How?*

Form small groups of four. In your groups, respond to the questions above. Create a visual depiction of your decisions. In plenary, hear each group's ideas about how they would do a concept test, stakeholder review, and/or pretest for this example project and why.

In the same small groups, briefly discuss what your experiences have been involving partners and gatekeepers in developing something together.

- *What's been useful?*
- *What advice would you offer for getting stakeholder input smoothly and productively?*

In the same groups, familiarize yourselves with the sets of **concept testing and pretesting checklists, examples and guidelines**.

- *Which of these areas are new to you?*
- *Where have challenges been?*

Vote on which of the tips you find most useful.




Please insert your own example of a project for the groups to discuss in this session or use this example:

Imagine that you are working on an HIV-prevention project to reach first- and second-year female students on college campuses. Imagine that you've reviewed existing research to see what has worked well on college campuses elsewhere. Your team has also visited many campuses directly to talk with staff as well as students about the risk of HIV and how to address it. You've drafted ideas for a mentorship program through which older female students would connect, personally, with first-year females. You envision a set of complementary materials including: Question and Answer cards modeled after a popular website on sexuality for college students in the U.S. You also envision a self-assessment tool, a personal journal with tips for students, and a series of stories for students to use in small groups. All the materials would be aimed at the same audience, with the same communication objective. The materials would reinforce each other.




### A Pretesting Brief and Question Guide

 Back in your project teams, select one material you are developing. Review the Example and draft a plan for:

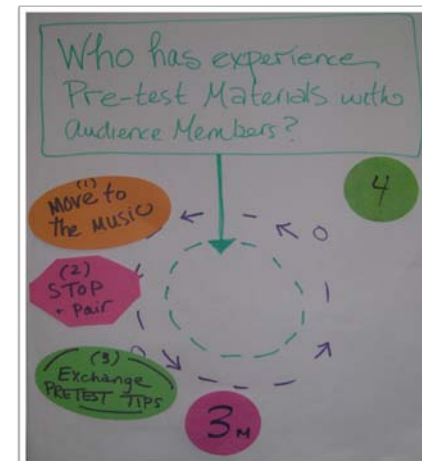
- concept testing,
- stakeholder review (Who would review it? When? How?), or
- for audience pretest (How many audience members will you interview? How many groups do you need? How many geographical areas do you have to include? What questions will you ask? Who will be your moderator and note taker? What is a good venue? How much transportation and facilitation fee do your participants need? What's the timeline?).

### Concept Testing vs. Pretesting

- Timing: concept testing is done earlier in the process
- Questions: concept testing questions are different and more open on concepts and formats before finalizing them for pretesting.

 We found that participants' firsthand experience with pretesting, and certainly concept testing, is less widespread than one might expect. Therefore, we invited volunteers to share some of their firsthand experiences with others.

One technique that works nicely for this is the “fish pond” technique, in which any member of the group is welcome to move their chair to the inside of the circle and enter into an informal conversation with colleagues about their personal experiences with pretesting or concept testing. Others in the circle listen and can move their circle into the middle freely if a comment sparks their own memory of an experience to share. We've found that a few real stories about the value of pretesting are worth hundreds of pages of theory.



## Session 3-6: Finalizing Designs and Getting Ready for Production



In project teams, go through the **checklist on quality messages and materials** and see if you have followed all the steps to develop high quality messages and materials.

As time allows, draft a sample material based on your story board. Share your sample material with another project team.

Each project team is asked to complete their final assignment for Module Three, as described in the *Practitioner's Handbook*. Facilitators coach the teams in the completion of their creative brief and in the drafting of one material/product as time permits.

We recommend a gallery walk so that all teams can celebrate each others' work, followed by a more focused feedback exchange among project teams using the traffic sign technique, as described at the close of Module One.



In the **3-part** version of this course, you may also have time for project teams to work out a timeline for production and to think through distribution as well.

In project teams, select one material that you plan to create, test, revise, and produce. Sketch out an estimated timeline, using our sample timeline as a reference. Be generous—expect some delays.



In the **2-part version** of this course, simply refer participants to the *Practitioner's Handbook* and highlight the need to work through detailed production and distribution timelines before being finalizing an implementation plan. Invite discussion on the following:

- *What questions do you have about the process or timing?*

## Team Sharing

Below is the project team assignment for the close of Module Three. 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 Three: **Creating**

Your team will develop a Creative Brief for one material or set of materials. The Creative Brief will draw from the communication strategy you've already drafted.

The draft Creative Brief will convey the:

- Goal and Selected Audience for the Material/s
- Changes, Barriers, and Communication Objectives
- Message Brief: Promise, Support, and Call to Action
- Key Content and Tone
- How this Material or Activity fits the Mix and other Creative Considerations.

You may also share:

- Plans to test your concept before drafting material
- Possible storyboard for the material