C-Modules

FOCUSING & DESIGNING

MODULE

012345

A LEARNING PACKAGE FOR SOCIAL AND BEHAVIOR CHANGE COMMUNICATION

FACILITATOR'S GUIDE

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C-CHANGE
COMMUNICATION FOR CHANGE

C-Modules: A Learning Package for Social and Behavior Change Communication (SBCC)

Communication for Change (C-Change) Project
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Contact information:
C-Change
FHI 360
1825 Connecticut Ave., NW, Ste. 800
Washington, D.C., 20009
USA
tel: +1.202.884.8000; fax: +1.202.464.3799
Email: cchangeCS@fhi360.org
Website: www.c-changeproject.org

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Closing of Module 2/Preview of Module 3

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

Objectives

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

- used the results of your formative 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)
- suggested a mix of communication materials and activities to achieve objectives with each audience

Recommended Graphics, Worksheets, Checklists, and Templates for this Module

Graphics	Worksheets, Checklists, and Templates		
• The Second Step of a Planning Process for SBCC—Focusing and Designing • A Socio-Ecological Model • The Theoretical Base of the Socio-Ecological Model and Concepts of Selected SBCC Theories • Three Key Strategies for SBCC • Where M&E Fits into SBCC	• Worksheet: Communication Strategy Outline • Checklist: Audience Segmentation • Worksheet: Audience Segmentation Map • Checklist: Audience Prioritization • Worksheet: Audience Profile • Worksheet: Matrix for Change • Worksheet: SMART Communication Objectives	• Worksheet: Strategic Approach • Worksheet: Positioning • Worksheet: Activity, Channel, and Material Mix • Worksheet: Deciding on the Right Channel and Material Mix • Worksheet: Channel and Material Selection	• Worksheet: Scenario to Create an Environment of Change • Worksheet: Draft List of Activities with Matching Channels and Materials • Worksheet: Draft Implementation Plan • Worksheet: Users and Uses of M&E Data

Opening

1. Begin each day with a team leading a session about **Yesterday's Learning.** Make sure this time is used to clarify any confusing or "hanging" issues from the day before. Estimate approximately 30 minutes per day for this activity.

2. Assign volunteer roles for the day (e.g., a timekeeper, a report team, and a logistics support team).

3. After reviewing the learning from the previous day, point out Step 2 in the C-Planning graphic and provide a brief introduction of this step.

4. Review posted objectives for Step 2 and how the agenda will accomplish these objectives.

If you are conducting a three-part workshop, participants may have gone back to their work sites after completing Step 1. If this is the case, you will want to include an opening to Step 2 during which project teams review the insights they took from their previous situation analysis. They can use the worksheet from the close of Step 1 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 1. They are ready for Step 2.

In the Southern African AIDS Trust (SAT) course, a reporting team from Zimbabwe planned and led a Yesterday's Learning session that involved everyone, challenged their 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 something that they remembered from Yesterday's Learning.

Module 2, Session 1: Communication Strategy

1. In plenary, introduce the **communication strategy** and review where Step 2 is in C-Planning**.**

2. Review the **strategy outline: overview**. Point out how the different parts flow into and inform each other and ask the group:
   - Has anyone worked on or with a communication strategy before?
   - What part of this outline will be new to you?
   - What parts are you already familiar with?

3. Form small groups and ask the groups to study the complete **Ethiopia example: communication strategy for client self-management** from the Practitioner's Handbook and have the groups discuss:
   - Where do you see each part of the strategy outline?
   - 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?

4. Once the groups finish discussing the questions, have them come back to the plenary and share their insights and questions.

5. Review the worksheet: "Communication Strategy Outline in Plenary." Share with the group the different components. Explain that parts of it were completed during Step 1, and the communication strategy will be completed in Step 2. Over the course of the workshop, each piece of the communication strategy will be completed.

6. Before moving on, ask participants if there are any questions regarding the communication strategy.

Step 2 of C-Planning, like all other steps, requires practice, gut instinct, and creative thinking. The tools provided can help participants take a systematic and comprehensive approach. 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 **communication strategy outline** in the handbook includes a sample summary analysis, a communication strategy, and draft implementation and evaluation plans. The focus of this step is on the communication strategy. As the facilitator, feel free to substitute another example from your own experience in place of the Ethiopia example. 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 step, participants will learn about creative briefs, which are developed for each audience and serve as a tool to guide the development of an SBCC effort.

Module 2, Session 2: Audience Segments, Priorities, and Profiles

1. In plenary, provide an overview of the description of **audience segments, priorities, and profiles** in the *Handbook*.

2. Form small groups and exchange ideas on the questions:
   - What is your understanding of audience segmentation?
   - Has it been useful?
   - What are some examples from your past experience?

3. In plenary, review the **South Africa example: audience segmentation table** and discuss this example. Provide an overview of the four criteria in the **checklist: audience segmentation**. Use one project group's example if another example is needed.

4. Form project teams and complete the **checklist: audience segmentation** for their project. Remind participants that this exercise is linked to the **people analysis** completed in Step 1.

5. In plenary, review the **checklist: audience prioritization.** Explain that it is used to make decisions about what audience segments will be prioritized. It is important to consider potential partners to maximize the scope of programming.

6. Form project teams to complete audience prioritization as a group.

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 C-Change worked with a female participant who represents a national network of PLHIV in her country. During a role-playing exercise, 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 **checklist: audience segmentation**). Participants said they found the exercise useful as a way to visualize the variety of people within what might, at first glance, be considered a single audience.

If you find participants stereotyping audiences, largely as a result of participants being rather distanced from their actual audiences, and time allows, you can try the "Whose Life" (Pink 2006) exercise, which demonstrates audience profiling. Working in small groups of five, review the contents of a handbag or pants pocket from unidentified individuals in the plenary. Without knowing who the person is, have participants try to determine what sort of personal, professional, or emotional life the person has. Each group should draw an audience profile based on this exercise. The benefit of this exercise is that it 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.

Module 2, Session 3: Barriers

1. In plenary, point out the barriers and communication objectives sections of the **communication strategy outline**. Note that one of the most important aspects of this approach to SBCC is the creation of communication objectives that directly address real barriers audiences face. Developing crisp and realistic communication objectives will not only focus the strategy but will also allow success to be measured.

2. Introduce the session on **barriers** and remind participants that when determining barriers they should put themselves in the mindset of each audience segment and use the audience profiles to see the world through the eyes of that particular audience.

3. Explain how the socio-ecological model can help to define barriers. Review the **theoretical base of the socio-ecological model** graphic and table in appendix 1. In small groups have participants discuss:
   - What is most critical for the audience segment: motivation, skills, values, norms, policies, products, or services? How do you know?
   - What theories can help explain the barriers? What are some potential applications of the theories?

4. Introduce the **matrix for change** example and review the first four columns noting the linkages among them. Note the last column on communication objectives will be completed in the following session.

5. Form project teams and complete the first four columns of the worksheet "Matrix for Change." Groups should discuss the following questions to complete the worksheet for at least two of their audience segments:
   - 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. Each team should 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 multi-dimensional and not confined to one of the three main strategies of SBCC.

Note that participants will look at barriers to change to develop communication objectives ***and*** they will look at obstacles again in the creative briefs as a basis for message development in Step 3.

If groups need more guidance, choose one example from among the projects in the room for the whole group to work with to develop a matrix for change.

Theory Activity for Activity #3. If you are tailoring the training for theory, please go to page 9 for guidance on conducting this activity.
After completing this activity, continue onto Activity #4 on this page.

Energizing the Learning

During the field test of this course with the SAT, the facilitators used an energizer called Deer-Hunter-Wall (Salas, Tillmann, McKee, and Shahzadi 2007). It was introduced on Day 2 and revisited every few days as an ongoing competition between the 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. This kind of competitive energizer kept the momentum going over a multiday workshop.

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

In addition to energizers, you can invigorate the learning tasks throughout the workshop in any number of ways. Here are just a few ideas:

- Walk about: At the 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, in a circle, or in clusters of chairs.
- Move your own orientation toward the group by switching the location of the front of the room.
- Ask participants to stand up and huddle around a visualized presentation for discussion in a "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.

Theory Guidance for Module 2, Session 3: Barriers

a. Review the **Theory Corner: theory of gender and power.** Ask participants for examples of how they have seen gender and power relationships influence an issue.

b. After the participants have finished sharing their experiences, explain that they will complete an inventory of power. Explain that understanding power relations can help to identify barriers to change for specific intended audiences. To focus attention on power relations, the group will conduct an inventory of power using five categories contained in a tool called the *power flower.* Explain the tool to participants:

- Draw a flower (as shown on a flipchart).
- Each petal of the flower will represent a category (e.g., gender, race/ethnicity, religion, age, and family size). Many of the categories will come from the context analysis completed in Step 1: Understanding the Situation.
- Review your People Analysis from Step 1: Understanding the Situation, and place those that have the most power on the outer edge of each flower petal. Those who have less power will be closer to the center of each petal.
- To complete your own personal inventory, mark the place on each flower petal where your organization might fall.

c. After groups have shared their power flower, discuss:

- What does this tell you about how someone in your situation might be a barrier to change?
- What does this tell you about how someone in your situation might facilitate change?

d. Ask participants to review the **Graphic: theoretical base of the socio-ecological model**. Ask participants:

- How do you see gender and power influence change at each of the levels of the socio-ecological model?
- What other theories can you use to address gender and power?

Module 2, Session 4: Communication Objectives

If possible, talk with participants before this session and identify one or two project teams that 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 that you will need to help break down 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 form the basis for development of materials and activities in the next module.

1. In plenary, review the meaning and purpose of communication objectives. Provide examples of communication objectives. Note how communication objectives are different from the program objectives that they may be used to. Ensure adequate time is spent on this task.

2. Examine the socio-ecological model and review the **tips: SMART communication objectives** and the **examples of communication objectives within the cross-cutting factors of the socio-ecological model for change**.

3. Working in small groups of three, discuss:
   - What do you find particularly useful about writing SMART communication objectives?

4. Ask the participants to bring their insights and questions about communication objectives back to the plenary and answer questions.

5. In plenary, ask for a volunteer to write a communication objective. Once this is completed, ask for several volunteers to use the SMART tips to refine the example and ensure it is a SMART communication objective.

6. In project teams, use the worksheet "SMART Communication Objectives" to develop communication objectives for group projects. Groups only need a sample of objectives, not an exhaustive list right now. While working on the worksheet, ask teams to get feedback on their objectives from other groups and refine them until they are satisfied.

Module 2, Session 5: Strategic Approach and Positioning

1. Point out the graphic **three key strategies of SBCC**. Ask participants to look at the graphic and read these words out loud to the participants:

   When we analyze situations fully, we realize that change takes much more than individuals making decisions 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.

2. Remind participants that they have completed a problem statement and suggested changes to address the problem. This session will look at the proposed changes more closely (e.g., by audience) to arrive at a coherent strategy that addresses the best "tipping point" for change. In plenary, introduce the session on strategic approach and positioning. Take participants through the **Albania example: strategic approach**.

3. Have the participants pair with someone from another project team and interview each other, asking the following questions:
   - 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?

4. As time allows, review the description and **Albania example: positioning**. Tell participants that 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?

5. In project teams, use the worksheets "Strategic Approach" and "Positioning" to define the project's strategy. Note that the approach shows how all the elements of the program fall into place to achieve change. As time allows, note some ideas for positioning.

To help participants understand more about framing their strategic approach, here is a visual 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?

Module 2, Session 6: Activity, Channel, and Material Mix

In the three-part option for this course, you'll have more time to delve into this session on channel mix. In the field test of this session with SAT, a silent role play (based on the **example: environment of change**) was used to illustrate the power of the channel mix. To conduct this activity, the facilitator will need to develop the story and create cards before hand, 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.

1. In plenary, examine the range of possible communication channels, materials, and activities. Break the participants into three groups and assign each group a category: interpersonal, community, or mass and social media. Ask the groups to brainstorm and discuss types of activities and materials that might be used for their channel. Then have the groups present their ideas. Once all the groups have presented in plenary, 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?

2. Introduce the session on activity, channel, and material mix. Review the worksheets "Activity, Channel, and Material Mix" and "Deciding on the Right Channel and Material Mix" to assess the three main channel types and their potential for reaching the target audience. In plenary, review the **example: channel and material selection** to help identify the best times and locations for reaching audience members. Individually walk through a typical day or week. Data on the audience's media preferences should contribute to making the final decision.

3. Form project teams and have them review the **"Activity, Channel, and Material Mix" worksheet** and complete **"Deciding on the Right Channel and Material Mix" and "Channel and Material Selection" worksheets.**

4. In plenary, read through the **example: environment of change—an example of mutually reinforcing activities, channels, and materials** in the *Handbook*. Have the participants discuss:
    - 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?

5. Form project teams and have them complete the worksheets "Draft List of Activities with Matching Channels" and "Materials" (by audience). Remind participants to use the worksheets they worked on in this session to check if those channels make the most sense and then finalize their decisions. If time allows, have participants draft one or two bullet points for the key content (column five).

Module 2, Session 7: Draft Implementation Plan

1. In plenary, ask the participants to gather around the C-Planning graphic. Point out that Step 4 is devoted to implementation. But it is important not to wait until Step 4 to draft an implementation plan. Thinking about it now helps programs to:
   - be realistic about the resources, people, and time needed to implement the strategy as outlined
   - begin to secure the resources, people, and time needed to effectively implement this strategy

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

2. Review the **Albania example: draft implementation plan**, ask the participants:
   - 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?

3. In project teams complete the "Draft Implantation Plan" worksheet. Once completed, each group can trade their draft implementation plan with one other team for feedback. While reviewing, the groups should discuss:
   - If you were a manager for this program, what would concern you? Why?
   - What might you do to address it?

Module 2, Session 8: Draft Monitoring and Evaluation (M&E) Plan and Baseline Indicators

1. 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 the evaluation.

2. Review the "Users and Uses of M&E Data" worksheet. Remind participants that it is important to think about what data will be collected and who will use it before fully planning the project. This worksheet will be used again in Step 5 when finalizing the M&E plan.

3. In project teams complete "Users and Uses of M&E Data."

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 three-part option, 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.

Module 2, Session 9: Refining the Communication Strategy

1. Ask project teams to review and refine the communication strategy based on learning from Step 2 and feedback from other participants. (The team-sharing assignment is on the following page.) While project teams are working, facilitators should support the teams in the completion of their draft strategies and in creating visual presentations to share with other teams. A gallery walk is a good way for groups to observe and celebrate each other's work . For a more focused feedback exchange among project teams, try using the traffic sign technique, as described at the close of Module 1.

All the project teams are bound to be at different places right now in terms of their communication strategies: some will need quite a bit of guidance to draft a coherent strategy; others will be refining theirs. 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 to 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 three-part option for this course, you will likely have time to work on them.

However, in the two-part option, instead of spending a lot of time on these sessions, you should simply:

- call the implementation and evaluation plans to the participants' attention
- explain that the draft implementation plan outlines aspects of the program that will be monitored
- 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 reviewed in Step 5.

Team-Sharing Assignment

Below is the project team assignment for the close of Step 2. 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 2:
Focusing and Designing

Your team will present a communication strategy. Include:

- Segmentation of at least two audiences
- Desired changes by audience
- Obstacles 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

1. At the end of Step 2, participants are half way through the *C-Modules*, and facilitators should conduct a quick midpoint feedback session to:
   - obtain feedback on the learning process
   - determine what SBCC skills or concepts might need to be addressed further or differently
   - give participants a structured opportunity to assess for themselves what they have taken from this course so far

2. Here are some options:
   - Have participants wander around the room and pick up one of the 10 SBCC principle cards from the floor that captures their attention. After picking a card, form small groups (with people they have not worked with much so far) and exchange ideas on the following questions:
     - Why did this principle grab your attention now?
     - What's something you'd like to learn or practice related to this principle?

   - The Human Scale (Salas, Tillmann, McKee, and Shahzadi 2007)
     - The Human Scale exercise is one useful technique. Make a line on the floor to represent a scale with markings from 0 percent to 100 percent. Ask participants to stand along the continuum to show how confident they feel with regard to a particular skill or concept that has been explored in the course so far. Your list might include, for example: a problem tree; a people analysis; the socio-ecological model; use of 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 share with the group.

You might be doing a two-part option for this course (i.e., continuing tomorrow with Step 3).

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

If you are doing the three-part option, you would close this part of the workshop with feedback from participants, and then give assignments to participants so that they continue to work on their SBCC efforts before returning for Step 3. Either way, a midpoint evaluation is highly recommended now.