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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 (SBCC)***

Communication for Change (C-Change) Project  
Version 3

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# Overview

## Proposed Workshop Schedule

<b>Day 7</b>	<b>Day 8</b>
<b>Step 3 Overview</b> <b>3-1 Getting Ready to Create</b> <b>3-2 Creative Brief</b> <b>3-3 Effective Messages</b>	<b>Review of Yesterday’s Learning</b> <b>3-4 Drafting Activities and Materials</b> <b>3-5 Concept Testing, Reviews, and Pretesting</b> <b>3-6 Finalizing Designs and Getting Ready for Production</b> <b>Closing of Step 3/ Preview of Step 4</b>

 For the three-part option, the participants come back for Steps 3 and 4. Please spend some time reviewing their onsite application assignments, the introduction, and Steps 1 and 2.

## Objectives

By the end of this one half-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 message brief (promise and support statement) that conveys tone, 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 pretesting

**Recommended Graphics, Worksheets, Checklist, and Templates for this Module**

Graphics	Worksheets, Checklists, and Templates		
<ul style="list-style-type: none"> <li>• The Third Step of a Planning Process for SBCC—Creating</li> <li>• Relationship Between the Strategy and Creative Brief</li> </ul>	<ul style="list-style-type: none"> <li>• Worksheet: What is the New Material/Activity Based on?</li> <li>• Worksheet: Inventory of Existing Materials and Activities</li> <li>• Worksheet: Analyzing Examples of SBCC Materials</li> </ul>	<ul style="list-style-type: none"> <li>• Worksheet: Creative Brief for Your Activity/Material</li> <li>• Worksheet: Effective Messages</li> <li>• Checklist: Basic Principles of Message Development</li> </ul>	<ul style="list-style-type: none"> <li>• Worksheet: Storyboard Outline</li> <li>• Checklist: Drafting Print Materials</li> <li>• Checklist: Quality Messages and Materials</li> <li>• Worksheet: Draft Production Timeline</li> </ul>

## Opening

1. 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. An estimated 30 minutes per day should be enough for this.
2. Locate Step 3 in the C-Planning graphic and clarify the purpose of this step in the process.
3. Review posted objectives for Module 3 and how the schedule will accomplish these objectives.
4. Assign volunteer roles for the day (i.e., a timekeeper, a report team, and a logistics support team).

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

Using actual participant materials as examples to teach new concepts can be tricky. 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 tips to do this effectively:

- 1) On the day before beginning this step, inform 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. Reassure 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.
- 3) 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).

## Module 3, Session 1: Getting Ready to Create

1. In plenary, review the description of **getting ready to create** and its place in C-Planning. Ask participants to name any type of communication product (e.g., a poster, a training manual, etc.) that they have worked on in the past that covers a health topic being addressed by this group.

Note how, even in this room, quite a bit of time and resources have gone into the production of communication materials.

2. Introduce the “What is the New Material/Activity Based on?” worksheet and form small groups. Ask groups to review their previous work done in Steps 1 and 2 before moving on to create materials (Step 3).
3.  Form project teams and complete the “Inventory of Existing Materials and Activities” worksheet. Remind participants to focus their inventory on materials that might already exist on the topic they are addressing or that cover a different topic. They can consider the following questions to guide their work:
  - Which of these activities, tools, or materials are still in use and why?
  - What can you use or adapt for your purposes before reinventing the wheel?
  - What can be learned from others in the field?

 1/2

If you are doing the two-part option for this course, you would have opened Day 1 with a marketplace for participants to share their recent work. As part of this sharing, they may have exchanged sample materials. This inventory can serve as a reminder of projects and materials already shared.

 1/2/3

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

- Remind everyone of the wealth of experience in the room.
- Give people concrete ideas for materials they may want to use or adapt.
- “Feed” the facilitators concrete examples of materials to reference throughout this module.



## Module 3, Session 2: Creative Briefs

1. In plenary, review the definition and purpose of a creative brief as described in the *Handbook*. Point to the **graphic: relationship between the strategy and creative brief** that shows the close relationship between the two processes.
2. In small groups, study the **overview of creative brief template** and discuss the following:
  - What part of the creative brief looks especially challenging to you? Why?
3. In the same small groups, review the **Ethiopia example: creative brief for client self-management materials**. Instruct the groups to imagine that they were tasked to draft the messages and materials described in the sample creative brief. They should discuss:
  - What parts of the creative brief do you find particularly useful? Why?

Return to plenary and exchange ideas about what they found particularly useful in the example.

4. Tell participants that they are going to complete a “working backwards” exercise. They will look at existing material and guess what might have been listed in the creative brief. Have participants gather around the flipchart with the creative brief categories and display the material selected for the example (e.g., one page of a flipchart or a poster). Ask participants to say what they think goes in each category of the “Analyzing Examples of SBCC Materials” worksheet. As participants give their answers, write them down in shorthand in the appropriate boxes, moving participants along so that they do not get stuck for too long on one category.
5. At the end summarize the creative brief and ask participants if the creative brief they developed reflects the material in the example. Ask if participants can see how a creative brief can help them to evaluate existing material.
6.  In project teams, select one material or activity from the strategy completed in Step 2. After teams make sure they are clear about the audience for the material/product and confident about the objective and the barriers it addresses, they are ready to create. Project teams can use the “Creative Brief for Activity/Material” worksheet.

If time allows, you may want to spend more time exploring the wide variety of possible materials and products. Encourage participants to be creative in the selection of a material type and to not always “default” to the most common posters, fliers, etc. Below are some guiding 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?

Participants really engage in the “working backwards” activity. Doing this activity in phases is highly recommended, so that you begin looking only at the first parts of the creative brief. Then you come back to the same example 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.

## Module 3, Session 3: Effective Messages

1. In plenary, review the middle section of the 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 that will stand out in the material, and it may often appear in a number of materials designed for a particular audience and objective.
2. Introduce the session and content on **effective messages**.
3. In plenary, ask participants to think back over the last week of their life and answer:
  - What communication materials have you seen or heard that caught your attention? Why?
4. In groups of three, have participants review the “Effective Messages” worksheet discussing the Seven Cs of effective communication, as outlined in the *Practitioner’s Handbook*. Groups should think of the examples cited before and consider:
  - Which of the Seven 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?
5. In plenary, review the **checklist: basic principles of message development**. Ask participants to reform the same small groups of three and discuss whether their example adheres to the principles listed in the checklist.
6.  In project teams, have groups work to develop a draft message for their project or refine an existing message for the material in their creative brief. Remind participants that their message is in raw form in their message brief, and working from it will enable them to refine the message. Give each project team 10 minutes to present their draft message—provide background on what their project does, who their intended audiences are, and what one message they want to communicate to their intended audiences. Participants should provide feedback using the **checklist: basic principles of message development**.

If participants need more time to get familiar with the message brief, try the following activity. Before the workshop collect some examples of materials that have components of the message brief (e.g. posters, flipcharts, etc.). The materials you choose do not have to be perfect, in fact if they are not perfect, this may elicit more group participation. To conduct the activity:

- Project on PowerPoint or have participants gather in front of the materials.
- Ask the participants a series of questions to develop the message brief (e.g., what do you think the key promise is?). Have participants shout out their responses.
- Once some time has been spent on the material, move quickly to the next material and repeat.

If the participants would like more information on effective messages, you can provide them with the following reference. Goodman A. 2002. *Why bad ads happen to good causes: and how to ensure they won’t happen to yours*.

[http://www.agoodmanonline.com/bad\\_ads\\_good\\_causes/index.html](http://www.agoodmanonline.com/bad_ads_good_causes/index.html)

**Theory Activity for #4-5.** If you are tailoring the training for theory, please go to page 8 for guidance on conducting activities #4-5.

After completing the theory replacement activities, please return to activity #6 on this page.

## Theory Guidance for Module 3, Session 3: Effective Messages

- 4a.** In groups of three, have participants review the “Effective Messages” worksheet discussing the Seven Cs of effective communication, as outlined in the *Practitioner’s Handbook*. Groups should think of the examples cited before and consider:
- Which of the Seven Cs appear to be honored in the communication example you named?
  - For example, was there a call to action? If so, what made it so memorable for you?
  - What theories do you think apply to these messages?
- 4b.** In plenary, read the **Theory Corner: Using Fear in Messaging**. Explain that this Theory Corner suggests that using fear in messaging usually leads to one of two responses: 1) control the threat or fear through denial or not acting on the fear; or 2) control the danger by taking action to prevent or reduce the fear.  
Ask the group:
- What questions come to mind when you think about the use of fear in messaging?
  - Where have you seen a message based on fear lead to the first (ineffective) response -- control the fear?
  - Where have you heard a message that leads to the second (effective) response -- control the danger?
- 4c.** In groups of three, ask participants to select at least one message discussed in plenary or created for your own social and behavior change efforts. Groups should discuss:
- How can you make sure that this message leads people to control the danger (not the fear)?
- Ask groups to share their examples, and exchange feedback in plenary.
- 5a.** In plenary, review the **Checklist: basic principles of message development**. Review the Theory Corner on the checklist and ask for any examples of messages from the group’s experience that have not worked because they were not relevant to the local context.
- 5b.** Review the Theory Corners on messaging (page 18) and the using fear in messaging (page 21). Emphasize the last sentence for the Theory Corner on messaging (page 18): “*Effective messaging that is audience-centered could be based on the **culture centered approach**, which helps to clarify how the cultures, beliefs, barriers, assets, and needs of diverse audiences can be addressed.*” Ask for any examples of messages from the group’s experience that have not worked because they were not relevant to the local context and did not take a culture-centered approach.
- 5c.** Ask participants to re-form the same small groups of three and discuss whether their example adheres to the principles listed in the checklist.

## Module 3, Session 4: Drafting Activities and Materials

1. In plenary, introduce the session and the ideas about how to use stories as outlined in the *Practitioner's Handbook*. After introducing the tips for developing a first draft, ask participants if they have any other suggestions they would like to add for activity and material development.
2. Form small groups of three. The groups should briefly share examples they can think of that describe how they have used stories to help create or structure a communication material. Have a few groups share what they discussed.
3. In plenary, review the example of a storyboard, as described in the “Storyboard Outline” worksheet. Tell participants they will practice creating a storyboard now. In the same trios as before, they will decide:
  - which person will tell a *true, personal* story about an event through which h/she became a good communicator
  - which person will write down words to capture highlights of the story in three parts: a beginning, middle (high point), and end
  - which person will illustrate the picture as h/she hears it, clarifying details as needed with the storyteller

The work should be done quickly—perfection in picture is NOT what to look for. Have the participants capture in three pictures the essence of the story and highlight it with words. After no more than 10 minutes, invite all groups to post storyboards. The whole group listens to each story as narrated by the storyteller.

4. In plenary, ask:
  - 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?
5. Review the **checklist: drafting materials** in plenary.
6. Form three groups. Each group will select a material (either their own or examples used in the workshop). Once the material is selected, groups should review the checklist to see which elements were adhered to in the development of this material.

If time allows, take participants through some examples of story-based materials (e.g., flipcharts, peer education guides, comic books). Facilitators will need to collect these materials before the workshop. After introducing the concept of story-based materials, explain to participants through how these materials are used.

If time allows, exchange additional tips regarding material development. 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 reviewing 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

If possible, offer an example of how stories were used in an actual SBCC effort.

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

1. In plenary, introduce concept testing, review, and pretesting. Provide an overview of each focusing on: why test, definitions, types of testing, purpose, when to test, and with whom.
2. In small groups, have participants review a creative brief (either an example provided by the facilitator, or one from the project teams). Participants should review the brief and answer these questions:
  - With whom might you do concept testing? When? How?
  - Who would you include in a stakeholder review? When? How?
  - With whom might you pretest draft materials? How?
3. Present the testing guidelines and tips. Ask participants if anyone has testing experience to share. Have other participants ask them questions about their experience or anything else they would like to know about testing materials.
4. Review the **testing guidelines** and **testing tips** in plenary. Ask participants:
  - How has your experience with testing followed or not followed these guidelines and tips?
  - Is there anything here that is useful for future testing?
5. Present the content (tips and example guide) on concept testing, stakeholder reviews (tips), and pretesting (tips and example guide).
6.  Assign each project team a type of testing (if there are more than three groups, assign multiple groups to concept testing and pretesting). Have each group develop a testing plan and guide for their test or stakeholder review of a material named in the creative brief.
7. After developing the guide, each group will role-play a test or review with the participants (e.g., a group that has developed a concept test guide will conduct a concept test with the other participants for their materials). After each group presents, have the group discuss:
  - What worked well?
  - What suggestions do you have for the group?
  - What did you learn from the group?

As this is a long session, dividing up the session into four parts is suggested.

1. Overview
2. Concept testing
3. Reviews
4. Pretesting

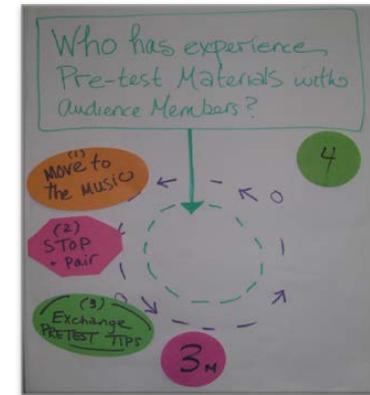


After presenting each section, weave in audience participation and reflection. For example after presenting the information on each type of testing, ask participants to review the sample testing guides and discuss:

- Which of these areas are new to you?
- What has been the most challenging?

Participants' firsthand experience with pretesting, and certainly concept testing, is less widespread than one might expect. Therefore, volunteers should be invited 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 into the middle freely if a comment sparks their own memory of an experience to share. A few real stories about the value of pretesting are worth hundreds of pages of theory.



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

1. Remind participants what they have already done to lead to this point in Step 3. They have worked on a creative brief that is aligned with their communication strategy, developed a message brief and content for their materials, developed storyboards, and drafted testing plans and guidelines. Introduce the final step in creating materials—**finalizing designs and getting ready for production**.
2.  Form project teams to review the **checklist: quality messages and materials**. Groups should check if they have followed all the steps to develop high quality messages and materials.
3. Each project team is asked to complete their final assignment for Module 3 as described in the *Practitioner's Handbook*. Facilitators coach the teams to complete their creative brief and draft one material/product as time permits.
4. Stage a gallery walk so that all teams can celebrate each other's work, followed by a more focused feedback exchange among project teams using the traffic sign technique, as described at the close of Step 1.



In the three-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 two-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 finalizing an implementation plan. Invite discussion on the following:

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

## Team-Sharing Assignment

Below is the project team assignment for the close of Module 3. Review it in plenary for clarity and allow ample time for the groups to prepare a visual aid to present to their colleagues.

### Final Team Sharing for Step 3: **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 and/or activity
- desired changes, barriers, and communication objectives
- components of the message brief: key promise, support statement, 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