

IMPLEMENTING & MONITORING

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 (SBCC)

Communication for Change (C-Change) Project
Version 3

May 2012



This publication is made possible by the generous support of the American people through the United States Agency for International Development (USAID) under the terms of Agreement No. GPO-A-00-07-00004-00. The contents are the responsibility of the C-Change project, managed by FHI 360, and do not necessarily reflect the views of USAID or the United States Government.

The six modules can be freely adapted and used, provided full credit is given to C-Change. Recommended citation:
C-Change. 2012. *C-Modules: A Learning Package for Social and Behavior Change Communication (SBCC)*. Washington, DC: C-Change/FHI 360.

C-Change is implemented by FHI 360 and its partners: CARE; Internews; Ohio University; IDEO; Center for Media Studies, India; New Concept, India; Soul City, South Africa; Social Surveys, South Africa; and Straight Talk, Uganda.

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Overview

Proposed Workshop Structure

Day 9	Day 10
<p>Review of Yesterday’s Learning</p> <p>4-1 Turning Plans into Action</p> <p>4-2 Work Plan: Who? Partnerships and Staffing</p> <p>4-3 Work Plan: With What?</p> <p>4-4 Work Plan: When? Sequence, Timing, and Synergy</p> <p>4-5 Pulling it All Together</p> <p>Closing of Module 4/Preview of Final Day</p> <p>4-6 Monitoring Process and Quality</p> <p>4-7 Using and Sharing Monitoring Data</p>	<p>Review of Yesterday’s Learning</p> <p>Back to the Principles!</p> <p>Final Written Feedback on Course</p> <p>“Expert” Panel</p> <p>Preparation for Workshop Part 2: M&E</p> <p>Final Assignment</p> <p>Closing Circle–Midday of Day 10</p>



If you do the two-part version of this course, there is no time scheduled for facilitating Session 6: Monitoring Process and Quality and Session 7: Using and Sharing Monitoring Data. You may refer participants to this part of their *Handbook* and to Step 5 in their *Handbook*. A review of these pages and worksheets will help prepare them for Part 2 of the workshop.



If you do the three-part version of this course, you may have time to explore Sessions 6 and 7 of Step 4 in some depth. Teaching monitoring at this step is recommended because it is here—at the start of implementation—where the monitoring plans get set in a real SBCC effort

Objectives

- By the end of this one-day module, you will have:
- drafted a workplan for one part of your SBCC effort
 - named at least two objectives and organized materials and activities for this draft workplan
 - proposed implementers for each objective of the workplan
 - described resources needed for each objective
 - outlined a timeline for achieving each objective

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

Graphics	Worksheets, Checklists, and Templates		
<ul style="list-style-type: none"> • The Fourth Step of a Planning Process for SBCC—Implementing and Monitoring • Three Key Strategies of SBCC • Where Monitoring Fits into SBCC 	<ul style="list-style-type: none"> • Worksheet: Detailed Work Plan • Checklist: Gender Issues in Planning, Implementation, and Evaluation • Checklist: Project Staffing Plan • Worksheet: SBCC Coordination • Worksheet: Supervisory Tool • Checklist: Successful Partnerships in SBCC 	<ul style="list-style-type: none"> • Worksheet: SBCC Budgeting Tool • Worksheet: How to Make Team Decisions on Budget Priorities • Worksheet: Plan to Identify and Approach Resource Providers • Worksheet: How to Make Team Decisions on Sequence, Timing, and Synergy 	<ul style="list-style-type: none"> • Worksheet: Template to Track Distribution Points and Production Needs (per Material or Activity) • Worksheet: Quality in SBCC • Worksheet: Plan to Monitor Process and Quality of All SBCC Materials and Activities

Opening

1. Once again, start this day, and every day, with the report team leading a session about **Yesterday's Learning**. Again, make sure this time is used to clarify any confusing or “hanging” issues from previous sessions. Spend approximately 30 minutes per day for this exercise.
2. Locate Step 4 in the C-Planning graphic and clarify the purpose of this step in the process.
3. Review posted objectives for Step 4 and how the schedule will accomplish these objectives. Show the workplan columns as the objectives are explained, so participants can see how the work evolves.
4. Assign volunteer roles for the day (i.e., a timekeeper, a report team, and a logistics support team).

Module 4, Session 1: Turning Plans into Action

- In groups of four have participants discuss:
 - How have workplans helped you in the past?
 - What challenges have you faced in developing workplans?
 - What challenges have you faced in implementing workplans?
- In plenary, review **turning plans into action** and Step 4's place in C-Planning. Point out the overview of the "Detailed Work Plan" worksheet. Review the *Handbook's* description of the workplan.
- Show how the first column is structured around the objectives, materials, and activities named previously in Steps 2 and 3. This column could be referred to as "What Works?"
- Tell participants that Step 4 will complete the remaining columns that answer the following questions:
 - Who? (partners, staff, volunteers, audience members)
 - With What? (resources available and needed to accomplish the objectives)
 - When? (estimated timeline, divided by quarter, if participants find that useful)
- Introduce the workplan template and ask participants to compare it to other workplans they have seen:
 - What do you see as the advantages of this format?
 - What do you expect will be a challenge?
-  Form project teams and have participants lay out the template that they will build on and complete the first column of their workplan. Suggest that they transfer communication objectives with corresponding materials and activities to the first column of their worksheet. Each team should work on at least two objectives.

What WORK?	Who?	With What?	When?
Communication Objective #1 Material Activity Material Activity	Staff, Volunteers, Partners, Audience	Money, Resources	By Quarter?
Communication Objective #2 Material Activity Material Activity			

Looking Through a Gender Lens



In the three-part version of this course, examine the **checklist: gender issues in planning, implementation, and evaluation**. Below are three learning exercises that address gender issues directly.

7. **Gender: What does it really mean?** Pair participants with someone of the opposite sex. Each participant writes down his/her own definition of gender. Ask:
- How would you describe gender to someone who walked in the room right now?

Have partners compare the ways they describe gender. Then review the concepts on the gender checklist and complete the steps listed in the *Handbook*. Each pair shares one example with the plenary.

8. **Gender Images and Roles.** Form small, single-sex groups and follow the steps below (Kambou, Mager, Gay, and Larry 2006). Check in with other groups as time allows along the way, but make sure to end the process by having participants share in plenary one insight they now have about gender and SBCC.
- **Step One:** Form same-sex groups of four to five individuals, mixing across projects. Have the groups illustrate what they understand to be an ideal man and/or an ideal woman. As a group, look at the illustration and see what it says about gender.
 - **Step Two:** Have participants return to the change scenario worksheet in Module 2 of the SBCC process. Now review or create that change scenario looking through a gender lens. Think about the way men and women are portrayed directly or indirectly in the scenario.
 - **Step Three:** Have participants read their “change scenario” aloud to the others in the group and ask them to consider these questions:
 - How are images of men and women portrayed in this scenario? How might your SBCC efforts affect these images?
 - **Step Four:** After each individual has presented their change scenario, discuss in small groups:
 - What are the current gender roles in the communities where you work? In what ways might your work reinforce or challenge these roles? What are the potential costs and benefits of reinforcing or challenging current gender roles?
 - **Step Five:** In plenary, have participants share one insight about gender and SBCC gained from this small group work.



9. In project teams, review the *Handbook's* checklist of gender issues at various phases of the program: planning, implementation, and evaluation.

Several resources named at the end of this module offer exercises and readings to explore gender in much greater depth. For example, you may want this group to deal with the issue of gender and how it has played out in their own lives (see ISOFI Toolkit) in greater depth or have them examine gender in the context of HIV and AIDS programs.

Theory Activity for Activity #8. If you are tailoring the training for theory, please go to page 7 for guidance on conducting Activity #8.

After completing the theory replacement activities, please return to Activity #9 on this page.

Theory Guidance for Module 4, Session 1: Turning Plans into Action

8a. In plenary, read the middle part of the **Theory Corner: Concepts of Social Norms, Gender and Sex**. Focus on linking norms with gender.

- What interests you in what you just read?

8b. Form small groups of 3-4 people, and ask the participants to share personal stories about a time in their own life when they felt they were going against gender norms – or any other social norms. Ask participants to think about a time they felt they were not quite doing what was “expected” in the way they approached their work, personal interests, or ways that they expressed themselves. If they are having trouble coming up with a story, ask participants to talk about someone else they know who challenged gender norms – or other social norms.

8c. In plenary, ask participants to share briefly how these personal conversations expanded or shifted their own thoughts and feelings about social or gender norms.

For the theory exercise, keep the full group conversation general but real. You don't want to hear people's personal stories in the full group; rather, you want to hear how the stories influenced people's thoughts and feelings on the challenge of norms.

Module 4, Session 2: Workplan: Who? Partnerships and Staffing

1. Introduce the session **workplan: who? partnerships and staffing**.

2.  Form project teams and review the **checklist: project staffing plan** and the “SBCC Coordination” worksheet. Using these lists as a reference, groups should develop an organogram of the staffing they envision for their SBCC program. Post the organogram for other teams to see and name issues that may make the staffing structure unstable.

- What is one way your project staffing could be strengthened?

3. In plenary, study the **example: a supervisory tool**. Ask participants to imagine they are a supervisor—now or at some point in the future.

- What do you particularly like about this tool?

4. Split the room into two groups. Hold a debate around the following statement:

- Partners can help with implementation, but they are unlikely to reduce your workload. Developing and maintaining partnerships is itself very labor intensive, and your role in leading, coordinating, and monitoring program operations is essential (National Cancer Institute 2001).

One group prepares to **defend** this statement and the other team **argues against** this statement by citing past experiences with partnerships.

5. In plenary, review the **checklist: successful partnerships in SBCC**. Discuss the following question:

- How do the experiences you just shared confirm the importance of any of these guidelines?

6.  Form project teams to develop the second column of the draft workplan. This column names *who*—partners, staff, volunteers, and audience members—will do the work associated with the material or activity listed. The learning tasks below may help to prepare the participants to complete this second column of their workplan.

Theory Activity for Activity #2. If you are tailoring the training for theory, please go to page 9 for guidance on conducting Activity #2.

After completing the theory replacement activities, please return to Activities #3-6 on this page.

Theory Guidance for Module 4, Session 2: Workplan: Who? Partnerships and Staffing

2a. In four groups, ask participants to think of a program that was less successful because the community was not involved in the planning, design, implementation or evaluation. Have the group discuss:

- What happened?
- What were the causes of not working with the community? Staff? Partners?
- What were the consequences of not working with the community?
- What do you think is the essential difference between working *for* the community rather than *with* the community?

Ask one group to share their discussion.

2b. In plenary read the **Theory Corner on Community Organization** and the explanation of Community Organization Theories (Theory 2.1 on page 32 of Module 0). After reading the Theory Corner, ask the plenary participants:

- Based on the information in the Theory Corner, what changes would you make to the staffing and partnerships?
- Who else will you invite to join in the planning, design, and implementation of the activity?
- Whose collaboration or assistance will make this effort real and complete, respectful and effective?

2c.  Form project teams and review the **Checklist: project staffing plan** and the “SBCC Coordination” worksheet. Using these lists as a reference, groups should develop an organogram of the staffing they envision for their SBCC program. Post the organogram for other teams to see and name issues that may make the staffing structure unstable.

- What is one way your project staffing could be strengthened?

2d. In plenary, ask participants to silently read through **Theory Corner: social capital and social networking** and circle the words or phrases that strike them. Once participants are finished, ask participants:

- What did you circle as essential to the social capital and social network theories?
- Where have you seen effective networks in action?
- How have networks been especially helpful to you in your work?
- Who else has an example that can help our understanding of social networks come alive?

2e.  Form project teams. Ask groups to create a poster using a large web chart or mind map, showing the social network of the project they are working on. Each team should label points on their poster with the specific groups, organizations, or communities that belong in their network. Ensure that program partners are listed on the poster. On the lines connecting the web chart or mind map, jot down the important resources or capital that each member of the network brings to the program. Ask a few groups to present their poster and answer:

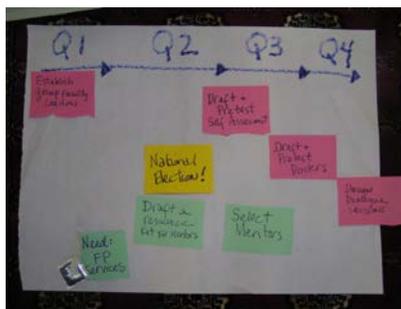
- What does the poster help you see about the social networks in your community?
- How will this influence what partners you identify?

Module 4, Session 3: Workplan: With What?

1. Introduce the session **workplan: with what?**
2. In plenary, review the “SBCC Budgeting Tool” worksheet with tips to make sure implementation stays within budget. Ask participants:
 - What other costs do you need to consider that are not in the worksheet?
3.  In project teams, have groups use the “SBCC Budgeting Tool” worksheet to start estimating costs for the activities listed in the first column of the workplan. Once they have completed drafting the list of costs, groups should use the “How to Make Team Decisions on Budget Priorities” worksheet to make sure there are sufficient funds or to make choices about budget priorities. Emphasize that it is important that the costs for the activities and the overall budget for the project are realistic.
4. Divide the participants into two groups. Have each write down and discuss:
 - What challenges do you face in approaching resource providers to fund activities or finding other methods of funding?
5. Once the groups are done, have the groups switch lists. Have the groups review the others’ list and provide suggestions to address each challenge.
6. After the groups are done, come back to plenary and have participants vote on the most realistic suggestions.
7. In plenary, review the “Plan to Identify and Approach Resource Providers” worksheet.
8.  Form project teams and have them complete the third column of the draft workplan—“With What?” This column is the place to list resources they will use to accomplish the objectives. Depending on the groups’ expertise and interests, groups may work with actual numbers and insert cost estimates into their workplan.

Module 4, Session 4: Workplan: When? Sequence, Timing, and Synergy

1. In plenary, introduce the session **workplan: when? sequence, timing, and synergy**.
2. In plenary, demonstrate how to work through the sequencing, timing, and synergy of materials/activities in an actual SBCC effort that participants plan to implement (acted out by facilitators).
3. In plenary, discuss:
 - What did you agree with in the team’s decisions about how to time and sequence their activities?
 - What would you have suggested to this team in terms of timing and sequencing? Why?
4.  Form project teams and use the “How to Make Team Decisions for Sequence, Timing, and Synergy” worksheet and follow Steps 1–6 on the worksheet, ending with the question:
 - What do you see now in terms of sequence, timing, and synergy across the materials/activities of your SBCC effort?
 - What would you like to do or find out before you finalize this workplan?
5.  At the end of this session, divide one last time into project teams to address the final set of columns in the draft workplan. This column names “When?” they will implement the materials and activities.



You may want the teams to refer back to the timelines they drafted in Step 3 for their estimates while doing this exercise.

The learning tasks in this step are highly recommended as a way to teach the subtleties involved in doing a realistic and effective timetable for SBCC implementation. Walk around and visit each team’s work, coaching as needed. Encourage all team members to be equally involved and to create a realistic visual (see next session for details). There’s no need to have teams share their work, as they will do that during the next session.

Module 4, Session 5: Putting it All Together

1. Introduce the session **putting it all together**.

2.  Form project teams and have participants review and refine the entirety of their workplans and create a visual to collect colleagues' feedback.
3. In plenary, each project team posts their workplan and assigns one member to stay with the poster. Other colleagues visit other groups and ask questions about the workplan they are visiting. Traffic signs could be used again, as described in Step 1.

4.  After exchanging feedback, form project teams. The teams should review the workplans and feedback. Each participant takes a turn interviewing another team member by asking:
- What aspect of your SBCC plans do you think will be MOST valuable in addressing the real problem at hand?
 - What part of your plan is unclear or incomplete in your mind?
5. Have each project team share an aspect of its plans that holds the most promise with the plenary, as well as one part it hopes to clarify or improve upon for implementation.
6. Review the list of tips for quality implementation. Have participants consider communication programs they've worked on in the past. Working in groups of three, have participants describe one strategy that they've seen used to ensure quality.
- Name what was effective in the leadership.
 - Name what was effective in the teamwork.



If this is the close of the first part of the workshop, you may choose to give each team specific feedback on their workplan with recommendations for next steps on-site, prior to returning for Step 5. Also it might be useful to review the checklists and worksheets available in the *Handbook*.



If you are leading the two-part version of this course, tomorrow would be the closing of Part 1. Review any ongoing feedback you may have been collecting from participants and notes you have from the daily **Yesterday's Learning** sessions so that you can clarify or explore any outstanding issues within the group.

One technique for obtaining ongoing feedback from participants is called the "Memo Board."¹ Here is just one way you might consider using such a board:

1. Create a poster with four rows and hang it near the exit of the workshop space. The four rows should read: clarity, usefulness, pace, other.
2. Create and title a series of columns for different topics or modules of the workshop and create a scale (1 = low; 4 = high) on which participants rate their satisfaction with each of the topics, using the criteria listed above.
3. Hang an envelope with comment cards inside so participants can add anonymous comments after rating the poster.



In the three-part option for this course, you may delve a bit more into aspects of production before groups finalize their workplans. If so, here's an idea for an exercise to conduct with participants:

In plenary, discuss your experiences regarding the following myth:

- *Myth:* People need the information you are providing, so you will have a large number of requests for your materials.
- *Fact:* "If we print it, they will come" holds true only if you are printing money. For most programs, effective promotion is critical to getting materials into the hands of those who need them. Disseminating printed products is as challenging and as important as developing them, and therefore needs a plan and budget.¹



In project teams develop a production and distribution plan. Use the "Template to Track Distribution Points and Production Needs (Per Material or Activity)" worksheet provided, if needed.

1. (National Cancer Institute 2001)

Team-Sharing Assignment

Below is an outline of the team assignment for the close of Module 4. 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 4: **Implementing**

Your team will develop a draft workplan for at least two communication objectives including:

- objectives, materials, and activities
- implementers
- resources
- timing

In your presentation, please also include:

- when and how you plan to pretest the materials prior to production

Module 4, Session 6: Monitoring Process and Quality

1. In plenary, discuss what monitoring means. Ask participants:
 - What parts of this description of monitoring are particularly useful to you?
2. Form small groups to discuss monitoring efforts participants have been involved with in the past. Share group discussions in plenary.
3. Point to the **graphic: where monitoring fits into SBCC** showing formative/situation analysis (Step 1), baseline research (Step 2), monitoring (Step 4), and evaluation (Step 5).
4. Form small groups to review and discuss the **types of evaluation: purpose, questions answered, and sample indicators** table that provides an overview of the distinctions between each step. Have groups write down three questions they have about the monitoring of SBCC efforts.
5.  In project teams, have participants review the **example: newsletter monitoring questionnaire** and **materials distribution monitoring list**. Project teams should select at least one material from their project and complete the “Plan to Monitor the Process and Quality of all SBCC Materials and Activities” worksheet.

Module 4, Session 7: Using and Sharing Monitoring Data

1. Introduce the session **using and sharing monitoring data**. Ask participants if anyone has experience using monitoring data in their programs.
2. Form small groups to share examples where participants had to refine or adjust their programs midway when evaluations indicated that their program was not working as originally intended.
 - How was this information received by staff? Field workers? Key groups in the community? Funders? Partners?
 - What have you found most important about the design of midline evaluations?
 - What do you recommend in terms of using and sharing the results?
3. Briefly discuss in plenary.