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LINKING WATER OPERATORS THROUGHOUT ASIA

# 10-Step Promotion Program Toolkit

Summary: Helping Water Services Professionals Improve Water, Sanitation, and Hygiene Programs



2009

This publication was produced for review by the United States Agency for International Development. It was prepared by AECOM International Development.





# **10-Step Promotion Program Toolkit**

## **Catalyzing Change One Step at a Time**

### **SUMMARY**

**Helping Water Services Professionals Improve  
Water, Sanitation, and Hygiene Programs**

Disclaimer

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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# FOREWORD

To help build the capacity of cities and utilities to promote the adoption of improved water and sanitation practices, Environmental Cooperation-Asia (ECO-Asia), a program of the United States Agency for International Development (USAID) Regional Development Mission for Asia (RDMA), developed the *10-Step Promotion Program Toolkit*. A copy of this summary report, as well as the Full 10-Step Promotion Program Toolkit, can be found online at: [www.waterlinks.org/promotion](http://www.waterlinks.org/promotion). ECO-Asia first piloted the Toolkit in the community of Russei Keo in Phnom Penh, Cambodia. Later, with the assistance of Indah Water Konsortium, Malaysia's national sewerage services provider, ECO-Asia further tested the Toolkit with the City of Medan, Indonesia. By following the steps outlined in this Toolkit, the City of Medan effectively conducted a promotion campaign to motivate households to connect to the expanded sewerage system.

This Toolkit also serves as a knowledge product of WaterLinks, a regional network that supports Water Operator Partnerships (WOPs) between water and wastewater utilities in Asia. Focused and sustained exchange, or twinning, between counterpart organizations is a proven mechanism for overcoming development challenges. WaterLinks disseminates knowledge products such as the Toolkit to provide water operators with additional tools to address the region's water and sanitation challenges. WaterLinks is supported by the Asian Development Bank (ADB), International Water Association (IWA) and USAID.



# GLOSSARY

Term	Definition
Advocacy	Advances an audience's belief that a proposed action is good, effective, and useful to address an issue/problem
Appeal	Extent to which product/service characteristic distinguishes it from competitors
Attitudes and Beliefs	Assessment of, feelings toward, and perceptions about product, service, or behavior
Attributes	Extent to which product/service physical components are practical to use
Audience	Group whose attitudes, behaviors, or practices are to be modified
Behavior	Habitual actions taken by the audience in the course of their daily routines
Behavior Analysis	Planned and consistent observation of a target audience's behaviors and practices. Behavior analysis is the science of systematically observing the practice of an action and explaining that action with regard to a communication objective. It serves to (1) gather information about the current behavior of the audience regarding a specific problem, (2) define feasible practices to promote, including understanding the conditions/factors necessary to ensure that the audience will adopt the promoted behavior, and (3) determine and provide the audience with the necessary conditions/skills to adopt the behavior
Behavior Change	Convincing an audience to adopt and replace current behaviors with target behaviors
Behavior Change Communication	Builds audience members' conviction that an action is the best choice for him/her and motivates him/her to try it and adopt it
Catalyzing Change	Prompting, motivating, or inspiring behavior change through project activities
Change	Modification of a target audience's attitudes, behaviors, knowledge, or practices with target attitudes, behaviors, knowledge, or practices
Channel	Local outlets, such as media, organizations, and individuals, that are used to disseminate target messages
Current Behavior	The actions or reactions of a target audience in response to external or internal stimuli
Customers	A generic term for any or all of these—clients, beneficiaries, and citizens
Enabling Environment	Local conditions that promote change and provide information, resources, and services that help the target audience sustain those changes
Expectations	Belief that product/service/behavior will have desired outcome

Term	Definition
Feasible practice	<p>Behavior a target audience can realistically be expected to adopt—based on local resources and pre-existing attitudes and practices—after a behavior change communication activity.</p> <p>A feasible practice is the most realistic or achievable behavior for a target audience to implement after the intervention(s). After careful analysis of the current behavior, implementers of promotion campaigns can propose specific changes that are in accordance with what the audience will find acceptable and will feel they are capable of doing. The changes often bear little or no similarity to one's original "ideal behavior," but will reap the desired behavior change.</p>
Hygiene Practices	Practices involving hand washing, clean and proper use of latrine facilities, and application of safe drinking water practices
Ideal Behavior	Behavior that generates the best results for the target audience. It usually corresponds to the principal behavior conceived of by program designers as the optimum.
Information and Education	Increases a target audience's awareness, understanding, and knowledge about the facts on a particular issue/problem
Infrastructure	Local resources, services, and utilities that provide the foundation for community maintenance and growth
Intention	Audience members' plans to perform promoted practice/behavior/business/construction
Knowledge	Facts accumulated through learning/training
Media	Communication outlets in an area used to disseminate information to residents of that area
Mobilization	Allows target audience members to express how they feel about performing the action, discuss it with other community members, and identify how they will continue or start to practice the action
Practices	Habitual actions shared by a community and based on local traditions, beliefs, and resources in a given region
Product	Encompasses any item used to promote a behavior or function as part of a service, such as a bar of soap, a basin, a plastic water main pipe
Promotion	Disseminating target messages and encouraging target behaviors in a target audience
Research Instruments or Tools	A collection of questionnaires, topic guides, surveys, or observation checklist, for example, used to collect data for design, monitoring and/or evaluation
Sanitation	Local infrastructure used to ensure healthy and hygienic conditions in a region—safe feces disposal and proper use and maintenance of latrines



Term	Definition
Sanitation Marketing	Use of social marketing and communication techniques to bring about change in community and individual sanitation practices
Self-efficacy	Confidence in one's own ability to perform practice, behavior, business, construction
Skills	Set of steps needed to perform and/or facilitate performance of promoted practice, behavior, business, construction
Social Marketing	Persuades target audience members that a proposed action is the best choice for them and prompts them to try it and adopt it
Social Norm	Behavioral standards that exist in a community for an individual to follow
Target audience	Includes the consumer, client, customer, and beneficiary of research and of a promotion effort. For a promotion effort, the target audience is specifically defined and segmented
Threat	Perceived danger to/of product, service, practice, behavior
Training	Training strengthens a target audience's ability to perform an action. It includes organized dissemination of information and skills.
Water	A natural resource used for sanitation, (e.g., taps and toilets), for health, (e.g., drinking water and washing), and as a local resource, (e.g., rivers and ponds)
Willingness and Ability to Pay/Provide	Individual's intention and capacity to pay/provide for product, service, practice



At this awareness raising meeting in East Java, Indonesia, community members learn about the pathways of pathogens and how hygiene can affect human health. Promotion campaigns are an effective way to improve public health, and environmental conditions, and build support for infrastructure upgrades.

## OVERVIEW

The purpose of a promotion program is to **bring about behavior change**. A promotion program is crucial to inform, educate, motivate, and persuade before a new practice is adopted, but the ultimate goal of any promotion program is to bring about and sustain the adoption of new practices. ECO-Asia, through WaterLinks, has developed a comprehensive guide to the design, development, implementation, monitoring and evaluation of a promotion program for water, sanitation and hygiene. This guide, *Catalyzing Change One Step at a Time: 10-Step Promotion Program Toolkit: Helping Local Government Officials and Utilities Staff Improve Water, Sanitation, and Hygiene Programs*, is available online at [www.waterlinks.org/promotion](http://www.waterlinks.org/promotion).

This document is a summary of the full-version Toolkit and provides an overview of the 10-step process to bring about positive change through a promotion program. All 10 steps and generated products along with selected examples and essential information are presented to illustrate the process. The full-version Toolkit functions as a comprehensive workbook that provides details on exact steps for designing, pre-testing, and implementing a promotion campaign. Before designing a fully developed promotion program with the full-version Toolkit, all users are encouraged to first review the Summary to understand the process involved. Afterwards, the full-version Toolkit can be used in the actual design and implementation of a promotion campaign.

### THE FULL 10-STEP PROMOTION TOOLKIT

The Full 10-Step Promotion Toolkit is designed to coach managers and other involved staff in designing and implementing a promotion campaign. In contrast to the Summary, the full-version functions more as a workbook, enabling its users to design, pretest, and implement a promotion campaign from step 1 through 10. The full toolkit includes:

- Steps, activities, and tasks that detail how to design and build a promotion program.
- A Glossary that describes essential terms used throughout the Toolkit.
- Diagrams that give a graphic representation of the steps and activities.
- Essential Information that can be used to effectively understand and tailor the activities and tasks to a particular situation or need.
- Examples that provide some ideas on how others have applied the task to their programs.
- Insider Tips that indicate practical tips based on experience worldwide.
- Products that are final deliverables for each step.
- Tools that provide details on “how-to” do something or a sample to be used or adapted.
- Additional references on promotion.
- Website references that advise where more web-based information can be found.

The Toolkit combines international best practices from the health and environment arenas in behavior change communication, marketing and mobilization, with tested change principles. It offers guidance on the essential elements of a successful promotion campaign: focused, audience-driven, behavior-change directed, research-based, indicator-grounded and creative.

This Toolkit asks the fundamental question: **How can we develop a promotion program to encourage an audience to change its behavior and adopt new healthful practices?** Too often, promotion campaigns are quickly conceived and fail to fundamentally change behavior, because the underlying motivations of the target audience were poorly understood and the message was not meaningful or relevant to them. Moreover, experience has shown that merely providing community members with information about 'how they should behave' is not enough to bring about behavior change.

The Toolkit is specifically designed to address these types of shortcomings by first engaging and understanding the audience, pre-testing the materials and activities and finally implementing behavior changes/practices. While the Toolkit aims to help water services professionals improve their water, sanitation, and hygiene programs, the same tools can be used for any health or development related promotion program.

The Toolkit will help practitioners to:

- Plan and implement a promotion program.
- Conduct change research to understand their target citizens/customers/audience.
- Synthesize research into major findings.
- Analyze major findings based on audience abilities, motivations and/or behavioral practices.
- Analyze major findings based on marketing tactics.
- Select the most appropriate promotion approach for the program.
- Develop a creative multi-media program.
- Develop a promotion plan.
- Apply techniques of behavior change communication and/or social marketing to water, sanitation and hygiene programs.
- Design promotional materials and activities.
- Develop appropriate process, outcome, and impact indicators for a promotion program.
- Monitor and evaluate a change promotion program to support new requests for funding.

In using the Toolkit, it is critical to understand that each step builds on the previous step through the use of specific activities and tools. Each tool helps a promotion campaign team make decisions to move forward. Each decision made informs subsequent decisions to be taken to complete a product.

## WHO SHOULD USE THIS TOOLKIT?

This Toolkit is for you and your organization, if any of the following are true:

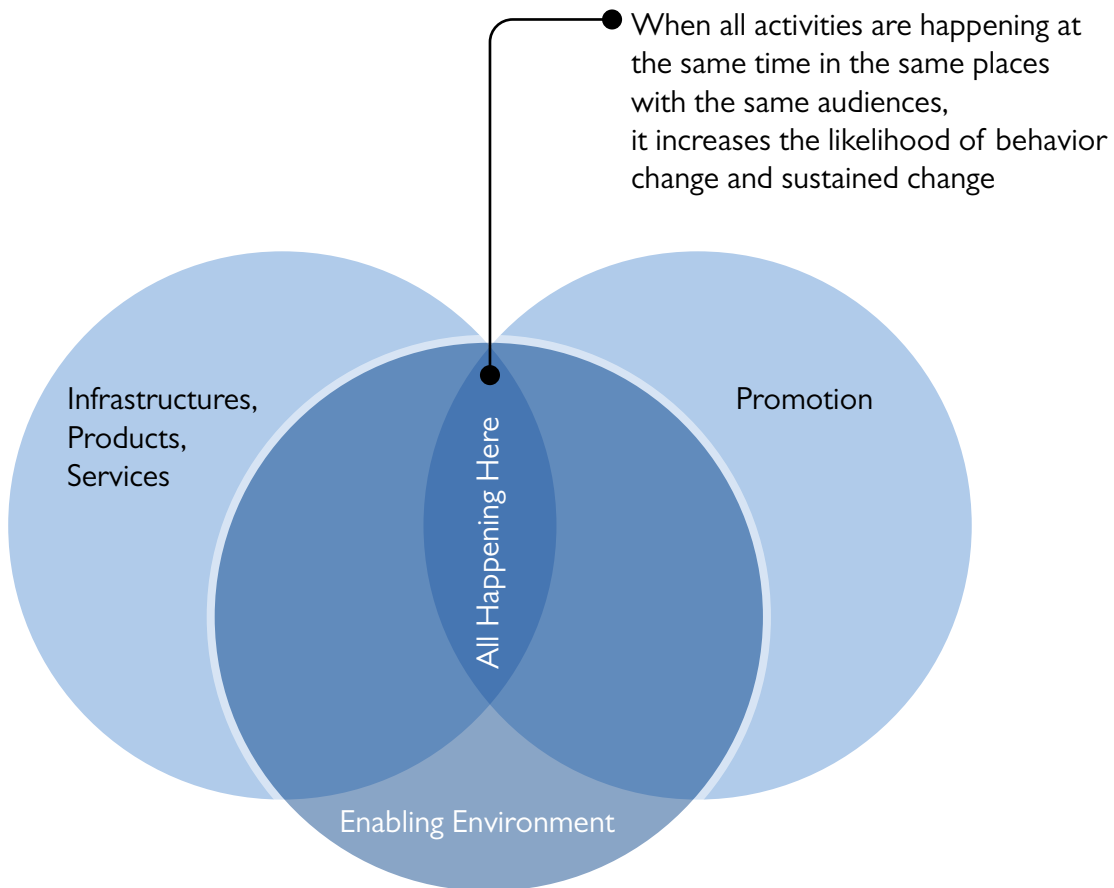
1. You work for a water or sanitation program or department.
2. You work in a local government agency or commercial/public utility.
3. You need to change what your citizens/customers understand, know, or do about water and sanitation in your community.
4. You have been tasked to develop and implement a promotion program – communication, social marketing, training, mobilization, or advocacy.
5. You plan to expand your services or products and see a need to promote a new customer base or raise fees on existing services and products to support the expansion.
6. You need to increase your collection rates, that is to say, the percentage of customers who pay their bills.
7. You work with communities to help them access improved water supply and sanitation services and improve their hygiene practices.
8. You supply water through piped water connections, public taps, truck deliveries or shops, selling of bottled water.
9. You provide sanitation services, such as piped sewerage, septic tank emptying or latrine construction.
10. You promote hygiene within communities, such as hand washing with soap, safe drinking water, personal or environmental cleanliness.
11. You are mandated by law to provide water supply and sanitation services to city residents.
12. You collect fees for water or sanitation services.
13. You are trying to bring about positive change in the communities where you may live and work.

## THE CONTEXT FOR DESIGNING PROMOTION PROGRAMS

Promoting fundamental behavioral changes in water, sanitation, and hygiene programs requires more than just providing the target audience with new information. It also requires the proper enabling environment to help community members adopt and sustain healthy practices. In other words, effective promotion programs demand that certain infrastructure, products, and/or services, and policies are in place.

Thus, when designing and implementing a promotion program, it is important to understand the larger context or overarching intervention areas that impact all programs and influence how citizens/customers might respond to the promotion. These three areas include: (1) Access to Infrastructure and Products and Service Improvements, (2) Promotion, and (3) Enabling Environment.

Infrastructure, Products and Service Improvements	Promotion	Enabling Environment
<ul style="list-style-type: none"> <li>• Actual product use</li> <li>• Existing services</li> <li>• Existing infrastructure</li> <li>• Existing products</li> <li>• Costs of services and products</li> <li>• Capacity of providers</li> </ul>	<ul style="list-style-type: none"> <li>• Actual hygiene practices</li> <li>• Existing hygiene promoters</li> <li>• Training materials available</li> <li>• Capacity of promoters</li> <li>• Existing materials</li> </ul>	<ul style="list-style-type: none"> <li>• Existing capacities to implement strategy</li> <li>• Financing options</li> <li>• Policies</li> <li>• Key supporting players</li> </ul>



The amount of overlap between these intervention activities occurring at the same time in the same places and with the same target audiences affects a program's ability to promote a feasible practice, and influences a citizen's/customer's ability to practice the same feasible practice. Recognizing the overall context will increase the likelihood of motivating citizens to adopt new lifestyle practices.

## GETTING STARTED

In planning a promotion program, there are a number of broad activities and tasks to be completed over an eight-month timeframe as illustrated by the table below. The first product is an eight-month plan of action, which synthesizes all ten steps presented in this Toolkit (see Product 1: Eight-Month Plan of Action in List of Final Toolkit Products).

**TABLE 1: PROMOTION PROGRAM ACTIVITIES AND TASKS**

Activities and Tasks to be Completed	Month
Select team members and organize team	Month 1
Review full-version Promotion Program Toolkit	
Prepare 8-month plan of action	
Step 1: Define problem, audience, ideal behaviors	Month 2
Step 2: Gather information	
Step 3: Focus problem, audiences and feasible practices	Month 3
Step 4: Design broad change strategy	
Step 5: Develop specific promotion plan	
Step 6: Prepare materials and activities	Month 4
Step 7: Pretest materials and activities	
Step 8: Implement promotion program	Months 5-8
Step 9: Monitor	
Step 10: Evaluate	Months 6 and 8



### Overview Product:

- Product 1: Eight-Month Plan of Action



Students from Marikina Elementary School in the Philippines are fortunate to have access to potable water in their school. The *10-Step Promotion Program Toolkit* is an effective way to start improving access to better water, sanitation, and hygiene in communities that still lack adequate services.



# 10-STEP PROCESS



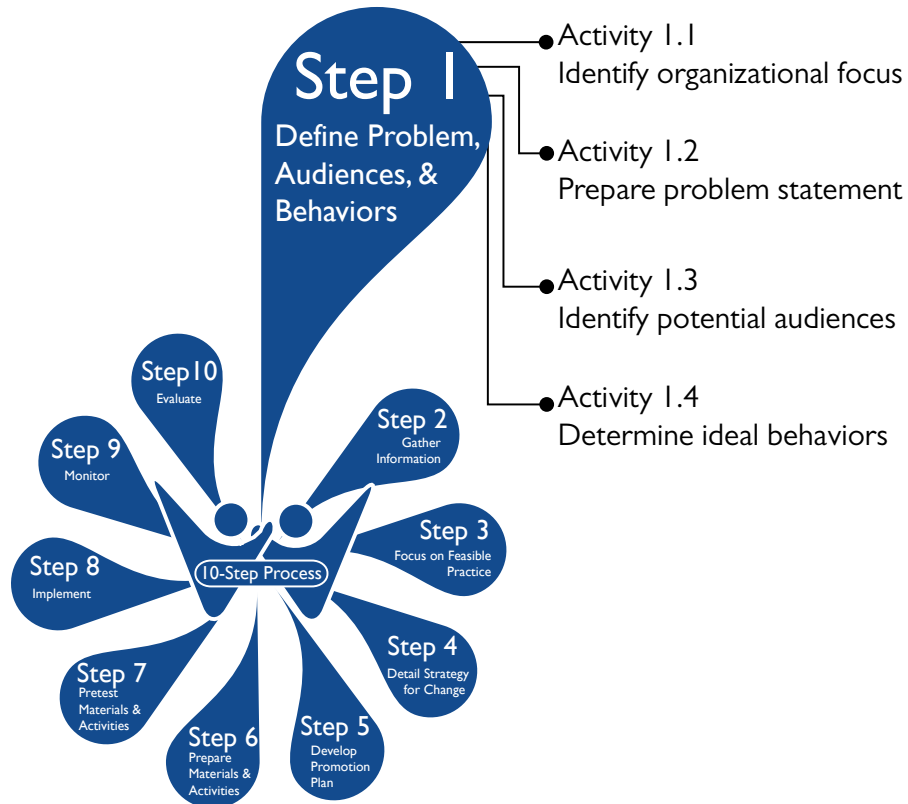


A staff member of Da Nang Water Company in Vietnam collects a sample of piped potable water to test its quality. *10 Step Promotion Program Toolkit* fosters positive behaviors changes designed to improve water, sanitation, and hygiene conditions.

# STEP 1: DEFINE PROBLEM, AUDIENCES, AND IDEAL BEHAVIORS

One program or promotion effort cannot be all things to all people at all times. Rather, it is vital to focus our efforts on the most important and most needed change. If we can initially define and prioritize our challenges, identify our potential audiences, and determine ideal behaviors, we can, step-by-step, focus our promotion efforts, bringing about the maximum impact and the best in our audience.

## Step 1: Define Problem, Audiences, and Ideal Behaviors



### Step 1 Products:

- Product 2a: Overview of Research, Section A

## ACTIVITY 1.1: IDENTIFY ORGANIZATIONAL FOCUS

Experience indicates that organizational priorities play a significant role in whether, when, and how resources are spent. Therefore, it is important to determine organizational priorities and use these as the starting point to focus the promotion effort. Areas of importance, goals, objectives, and priorities change constantly within any organization. Accordingly, it is necessary to regularly reassess what is important so that the promotion program can focus on an organization's most current priorities.

## ACTIVITY 1.2: PREPARE PROBLEM STATEMENT

A problem statement is a clear, concise description of the issue that needs to be addressed by the promotion effort. A well-written problem statement lays the foundation for the work to be conducted. A problem statement includes background information, the current situation and challenges, the location, and the groups of people involved (potential audience). For example, a program in India prepared the following problem statement:

*The Mahesh Water and Sewerage Company (MWSC) has provided piped water on a fee-basis to the four peri-urban villages of Shirah, Seerish, Hamed, and Pershaw for three years. Presently, it appears that nearly 85% of female-headed households with four or more children boil their MWSC piped water before drinking it as a year-round practice. MWSC believes that this happens because there is still a belief among villagers that any water, including piped water, is unsafe to drink unless it is boiled. Moreover, numerous non-governmental promotion programs continue to emphasize that water must be boiled to be safe for drinking, even after the coming of MWSC's safe piped water. As a result, customers waste around \$1 per day unnecessarily boiling their water, even though MWSC piped water has been tested and proven to be a safe drinking source.*

## ACTIVITY 1.3: IDENTIFY POTENTIAL AUDIENCES

It is necessary to have a general understanding of the root of the problem and identify the target audience accordingly. For example, in some countries research has shown that women often want latrines and understand the importance of sanitation facilities and hygiene, but sanitation efforts may not be a priority since men tend to be the household decision makers and control the household budgets. Therefore, the target audience of a promotion program might not be the women, but the men. Alternatively, one component of the program might be increasing skills for women to negotiate use of the household budget for sanitation and hygiene purposes, in addition to a second component that addresses behavior change for men in allocating resources to latrine construction. It is important to think about the root of the problem(s) that have been identified and what the targeted audience's needs might be.

## ACTIVITY 1.4: DETERMINE IDEAL BEHAVIORS

An ideal behavior is the behavior that would generate the best possible results for the target audience. This behavior should correspond to an internationally agreed upon 'Standard of Excellence.' For example, the World Health Organization recommends the following ideal hand washing practice:

*Wash hands with soap and air dry at the 5 critical times: (1) before eating, (2) after handling child's feces, (3) before preparing food, (4) before feeding a child, and (5) after defecating.*

## **SUMMARY**

The final three activities detailed in Step 1—problem, audience, and ideal behavior—are the foundation for researching, designing, developing, and implementing the promotion program. These foundation pieces will be further shaped, refined, focused and detailed as the process continues. Be flexible and remember that we have just started. As we learn more about our problem and our audience, we will adapt the elements of the promotion campaign until we have the right messages and tools for our target audience.

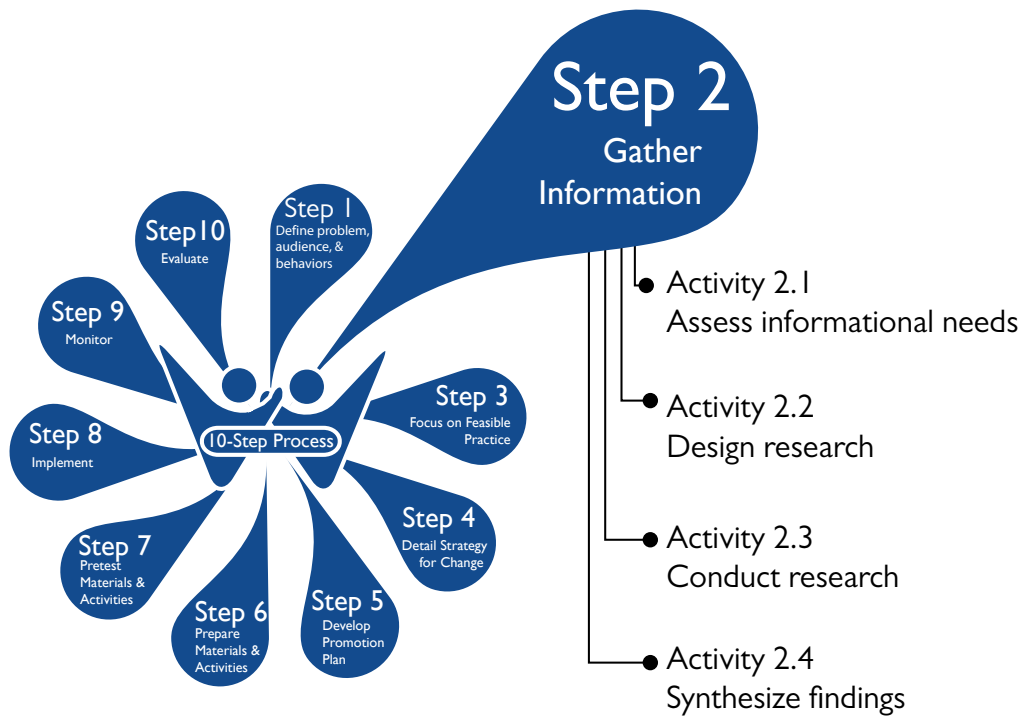


Women from the Russei Keo neighborhood, located in Phnom Penh, Cambodia, gather to discuss the water, sanitation, and education needs in their community. Information gathered from target audiences firsthand will help sharpen a promotion campaign's messages and strategies.

## STEP 2: GATHER INFORMATION

Now that we have identified the problem, the potential target groups, and the possible ideal behaviors, it is necessary to further investigate the behaviors of the audience(s). We must determine what we know and what we still need to know and gather the necessary information.

### Step 2: Gather Information



### Step 2 Products:

Product 2b: Overview of Research, Section B

- Research Tools/Instruments
- Research Synthesis

## ACTIVITY 2.1: ASSESS INFORMATIONAL NEEDS

For a program to successfully promote a product, a service, an idea or a behavior, it must understand its potential audience. This can be done by answering a series of questions on the factors that might influence the audience related to their ability to practice an ideal behavior, influences that can catalyze this ideal behavior, and motivations promoting or hindering this ideal behavior. Table 2 lists some questions to ask the audience to better understand abilities, influence and motivation towards an ideal behavior.

**TABLE 2: INFLUENCING FACTORS**

Ability	Influence	Motivation
<ol style="list-style-type: none"> <li>1. Knowledge – What do they know about the issue?</li> <li>2. Social Support – What technical, financial, informational and support currently exists to assist them in adopting the promoted behavior?</li> <li>3. Skills – What skills do they think are needed? Do they have these skills? What training resources exist?</li> <li>4. Confidence – What are current products/services? To what extent do they believe they can perform this practice?</li> </ol>	<ol style="list-style-type: none"> <li>1. Availability – What products/ services currently exist to support this behavior?</li> <li>2. Attributes – To what extent are the product or service practical to use?</li> <li>3. Appeal – What benefits do they perceive to themselves or their families if they perform or purchase what is being promoted?</li> <li>4. Social Norm – What is the present practice within the community on this issue?</li> </ol>	<ol style="list-style-type: none"> <li>1. Attitudes &amp; Beliefs – How do they feel about the product, service, practice to be changed or promoted?</li> <li>2. Intention – To what extent do they state they will try what is being promoted?</li> <li>3. Expectations – What do they believe will be the outcome if they try what is being promoted?</li> <li>4. Threat – What are the perceived dangers associated with what is being promoted?</li> <li>5. Willingness and Ability to Pay – What is their intention and capacity to pay for what is being promoted?</li> </ol>

It is also important for the program to consider external factors that can impact the audience adopting an ideal behavior. This includes the accessibility of the infrastructure, products, and service improvements needed to practice this ideal behavior, the current promotional efforts and the enabling environment required to support this behavior. Table 3 lists some of the external factors to consider when determining what information is needed to design a promotion program.

By assessing our informational needs and understanding what is already known, it will be easier to identify gaps and collect only the missing information, saving time and resources.



**TABLE 3: INTERVENTION AREA FACTORS**

Infrastructure, Products and Service Improvements	Promotion	Enabling Environment
<ul style="list-style-type: none"> <li>• Actual product use</li> <li>• Existing services</li> <li>• Existing infrastructure</li> <li>• Existing products</li> <li>• Costs of services and products</li> <li>• Capacity of providers</li> </ul>	<ul style="list-style-type: none"> <li>• Actual hygiene practices</li> <li>• Existing hygiene promoters</li> <li>• Training materials available</li> <li>• Capacity of promoters</li> <li>• Existing materials</li> </ul>	<ul style="list-style-type: none"> <li>• Existing capacities to implement strategy</li> <li>• Financing options</li> <li>• Policies</li> <li>• Key supporting players</li> </ul>

## ACTIVITY 2.2: DESIGN RESEARCH

The key to designing an effective research methodology is to ask what are the most appropriate research methods, who are the audiences and if the audiences are representative (sampling size). It is also important to ensure that the language used for the research is appropriate and understandable to the audience.

There are two types of information gathering—quantitative and qualitative. Each type has different methods, such as a quantitative survey or questionnaire, or a qualitative in-depth interview or focus group discussion. Depending on what questions still need to be answered, a combination of methods can be used to effectively fill informational gaps.

**TABLE 4: QUANTITATIVE VS. QUALITATIVE**

Quantitative	Qualitative
<ul style="list-style-type: none"> <li>• Seeks to establish “how many” and the relationship between variables.</li> <li>• Facilitates the use of numbers and statistics for aggregating, summarizing, describing, and comparing data.</li> <li>• Allows for a broad generalization of findings to the larger population.</li> </ul>	<ul style="list-style-type: none"> <li>• Allows the researcher to study selected issues, cases, or events in-depth and detail through direct quotation, interaction, and observations.</li> <li>• Seeks to answer the reasons “why.”</li> <li>• Is in-depth, exploratory, and allows for more probing.</li> <li>• Allows for interaction between the facilitator and the participant(s).</li> <li>• Portrays the participants’ emotions, perceptions, attitudes, motivations, etc.</li> </ul>

As a next step, it is necessary to determine and detail the specific demographics of the targeted research audiences. This will help to support decision-making and ensure that information is gathered from the appropriate audiences. As part of this task, it is essential to include women in any sample as their perspectives and roles may differ significantly from men. It is critical to be confident about the research results and to know that a sufficient number of the target audience has participated in providing the needed information. Finally, use appropriate language in the research documents tailored to each audience. For example, “septage management” may not be understandable to the audience unless clearly defined and explained.

### **ACTIVITY 2.3: CONDUCT RESEARCH**

Plan at least two months to conduct research and analyze behavior. Remember to include time for pretesting and finalizing research tools and selecting and training data collectors. It is also necessary to develop a research budget to ensure that funds are available to conduct research.

### **ACTIVITY 2.4: SYNTHESIZE FINDINGS**

Synthesize gathered information on an ongoing basis. The example below comes from data collected from 735 households over two months during a sanitation marketing and hygiene promotion project targeted at peri-urban areas. All research represented here is qualitative, collected through three different sets of focus group discussions. Infrastructure, products, service improvements, promotion, and enabling environment have been folded in where appropriate.

**TABLE 5: SAMPLE SYNTHESIS OF SELECTED CONSUMER DATA ON SANITATION AND HYGIENE**

Ability	Male Tenants	Female Tenants
Social Support	<ul style="list-style-type: none"> <li>• Little or no help or information has been provided on sanitation and hygiene for the household or the community.</li> <li>• Health workers available now in communities could/should be used.</li> <li>• Landlords should tell tenants what to do.</li> <li>• Want some guidance from village leaders.</li> <li>• Counselors could be assigned by leaders to assist and advice.</li> <li>• City Authority is responsible first, landlords second.</li> <li>• Tenants should liaise with landlords.</li> </ul>	<ul style="list-style-type: none"> <li>• Health workers are good sources of information and advice.</li> <li>• Landlords are responsible for construction, tenants for cleaning.</li> <li>• Fathers are responsible for purchasing soap.</li> <li>• Should work hand-in-hand with landlords.</li> <li>• Leaders should be prepared to advise.</li> <li>• Good communication methods include door-to-door, community meetings, village seminars.</li> </ul>
Skills	<ul style="list-style-type: none"> <li>• No skills training has been received on latrine construction using slab casting.</li> <li>• Teach us; “we are willing to learn.”</li> <li>• Landlords construct; tenants maintain and clean.</li> </ul>	<ul style="list-style-type: none"> <li>• No skills training has been received on latrine construction of slab casting.</li> <li>• Want to learn how to cast slabs.</li> <li>• Need to learn about chemicals that reduce latrine volume, making latrines last longer.</li> </ul>
Confidence	<ul style="list-style-type: none"> <li>• Feel cannot do much as it is the landlord’s responsibility.</li> <li>• Some have built own latrine and owner paid them.</li> <li>• Even if have good latrine, water is unavailable.</li> </ul>	<ul style="list-style-type: none"> <li>• Many built own latrines, didn’t wait for landlords.</li> <li>• Those affected should take responsibility for construction.</li> </ul>

Influence	Male Tenants	Female Tenants
Availability	<ul style="list-style-type: none"> <li>• Have latrine on plot.</li> <li>• Hygiene depends on availability of water.</li> <li>• Many use plastic bags or cartons when no latrine is available or when it is full.</li> <li>• Some use marketplace toilet when theirs is full.</li> </ul>	<ul style="list-style-type: none"> <li>• Have latrine on plot.</li> <li>• Many use plastic bags or cartons when no latrine is available or when it is full.</li> <li>• Every household should have a toilet.</li> </ul>
Attributes	<ul style="list-style-type: none"> <li>• Closeness of houses leaves no proper place for disposal.</li> <li>• Odorless.</li> <li>• Community-based.</li> <li>• No flies.</li> <li>• Clean.</li> <li>• Few people using it.</li> </ul>	<ul style="list-style-type: none"> <li>• Odorless.</li> <li>• Good structure; poor construction compromises sanitation.</li> <li>• Door.</li> <li>• Easy to clean.</li> <li>• A good latrine is like “tea with milk.”</li> </ul>
Appeal	<ul style="list-style-type: none"> <li>• Toilet gives respect.</li> <li>• Clothes give respect.</li> <li>• A good house gives respect.</li> <li>• Good manners are respectful.</li> </ul> <p>(Respect translated can mean safety, dignity, and attractiveness.)</p>	<ul style="list-style-type: none"> <li>• If a house and latrine look beautiful, it is respectful.</li> <li>• Respectful people are responsible people.</li> <li>• Preventing disease gives respect.</li> </ul>
Social Norm	<ul style="list-style-type: none"> <li>• Hygiene situation in community is poor.</li> <li>• Sanitation situation in community is poor.</li> <li>• Leaders need roles and responsibilities that are well-defined.</li> <li>• We should all be responsible, but need leadership.</li> </ul>	<ul style="list-style-type: none"> <li>• Hygiene situation in community is poor.</li> <li>• Sanitation situation in community is poor.</li> <li>• No one is responsible, we need to know who will help and advise.</li> </ul>

Motivation	Male Tenants	Female Tenants
Attitudes and Beliefs	<ul style="list-style-type: none"> <li>• Hygiene promotes good health.</li> <li>• Landlords are poor and cannot construct a “good” latrine.</li> <li>• No one listens to me, they listen to leaders and landlords.</li> <li>• Can upgrade toilet, but not to the excellent standard, just good (“better than what we have now”).</li> <li>• Need respect.</li> </ul>	<ul style="list-style-type: none"> <li>• Good hygiene promotes good health.</li> <li>• Cleanliness is more important than the structure.</li> <li>• Insufficient counseling on hygiene issues.</li> <li>• Clean latrine means a healthier family.</li> <li>• Latrines are for the wealthy and we will never be rich.</li> </ul>
Intention	<ul style="list-style-type: none"> <li>• We will take responsibility.</li> <li>• We will listen to each other as tenants.</li> <li>• We will mobilize ourselves.</li> </ul>	<ul style="list-style-type: none"> <li>• We will take responsibility.</li> <li>• We tenants can get together and little-by-little contribute to a good latrine.</li> </ul>
Expectations	<ul style="list-style-type: none"> <li>• Send people to talk to landlords and convince them.</li> <li>• Have government impose rules and conduct inspections.</li> <li>• Delegate tenant to be responsible and deduct from the cost his rent.</li> <li>• Have government pass a law that “every plot must have good latrine.”</li> </ul>	<ul style="list-style-type: none"> <li>• Send people to talk to landlords and convince them.</li> <li>• Make plot owners responsible for sanitation.</li> <li>• Target landlords to make a difference.</li> </ul>
Threat	<ul style="list-style-type: none"> <li>• Poor latrines are dangerous even for adults, but worse for children and elderly.</li> <li>• Plastic bag/cartoon “toilets” are unsafe for us and children.</li> <li>• Too many people using one latrine increases diseases and danger.</li> </ul>	<ul style="list-style-type: none"> <li>• Too many people using one latrine increases diseases and danger.</li> <li>• Fear landlord will raise the rent if latrine is improved too much.</li> </ul>
Willingness & Ability to Pay	<ul style="list-style-type: none"> <li>• Excitement of friends makes us want to buy.</li> <li>• Amount of money we have determines what we buy.</li> </ul>	<ul style="list-style-type: none"> <li>• Money decides what to buy.</li> <li>• If have better latrine, need more buckets to clean.</li> </ul>

## SUMMARY

We have now gathered the needed information about our audiences’ abilities, influences, and motivations, as well as about the supply and demand for infrastructure, products and services improvements; the present promotion situation; and the enabling environment. We can proceed to analyze this information from a behavioral perspective and choose the appropriate approach or combination of approaches to use in our promotion effort.

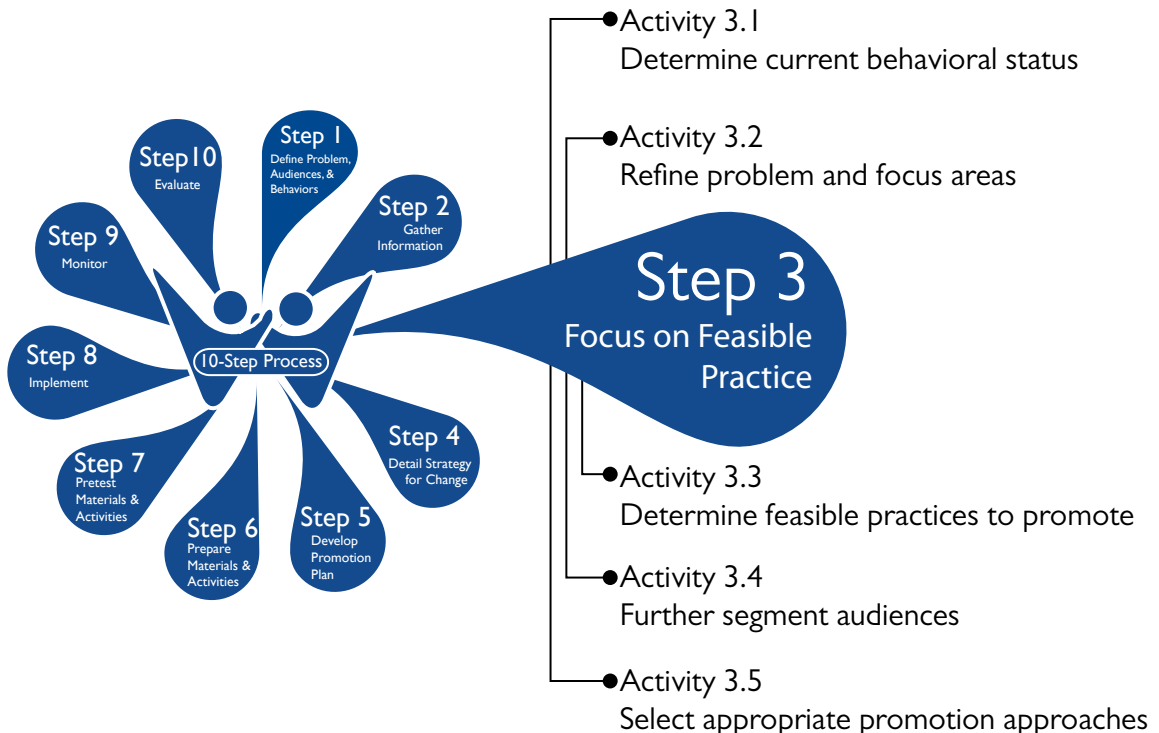


Officers from the local government in Manila talk with a resident about the importance of ensuring hygienic practices in her household. Narrowing the target audience to a certain sector, community or age group and focusing on one behavior helps to strengthen promotion messages.

## STEP 3: FOCUS ON FEASIBLE PRACTICE FOR ONE AUDIENCE AND ONE PROBLEM

We know that it is often times easier to tell someone what they should do, rather than to think through exactly what is needed to carry out the requested new behavior. If someone tells us, “Buy a new septic tank!” or “Boil your water!” would we do it simply because they said so? Or would we consider: (1) the impact such a change would have on us and those around us; (2) what we would need to do to adopt the behavior; (3) whether we could/would do it; and/or (4) whether we had what was necessary to make the change. Our audience will consider these same issues in deciding whether to change their behavior.

### Step 3: Focus on Feasible Practice for One Audience and One Problem



#### Step 3 Products:

- Product 2c: Overview of Research, Section C
- Product 3: Behavior Analysis

## Behavior Change

Behavior change happens little by little. An audience faces competing concerns everyday to change its behavior. A program must understand the following:

- What are the competing concerns of its audience? *What other behavior changes are they being encouraged to adopt?*
- How does an audience perceive the result of the behavior change? *Is it a reward?*
- What value does the audience place on that result? *Is it worth it?*
- How does the program make its desired behavior change a worthwhile reward? *What incentives do the audience need/want?*

Is the promotion campaign a team-effort, audience-centered, research-based, behavior-specific, and multi-channeled? Only such a program can encourage an audience to change its behavior and adopt new healthful practices.

### ACTIVITY 3.1: DETERMINE CURRENT BEHAVIORAL STATUS

It is vital to know the potential audience's current behavior before trying to modify or encourage any behavioral changes or practices. Are they aware? Are they knowledgeable? Do they intend to try? Have they tried the practice? Have they evaluated this practice? Do they plan to keep practicing? Detailing what people are actually doing provides a picture of their starting point for new or modified practices. Comparing motivators and barriers to ideal behaviors offers a clear idea of possible obstacles, and points to encouraging a new or modified practice.

Seven factors must be considered when examining behaviors and practices: (1) expected outcome, (2) skills, (3) confidence, (4) emotions, (5) perceived social norms, (6) self-standards, and (7) environmental restrictions. Each of these factors can be motivators or barriers to behavior adoption and practice.

It is the commonalities among audience members that help build a solid promotion program. While differences should be identified and acknowledged, it is what an audience has in common that draws them together. This common fabric encourages people to follow social practices and allows them to come together for a cause or, in the case of a promotion program, a feasible practice with a desired outcome.

### ACTIVITY 3.2: REFINE PROBLEM AND FOCUS AREAS

Never be too proud to admit when initial assumptions are later proved incorrect. Use the research to strengthen the program and better define the problems and issues of the communities and audiences.

As mentioned before, no promotion program can be all things to all people. It is tempting to try and address multiple audiences on multiple topics at the same time. However, a successful promotion



program will not have the desired impact if it tries to do so. It loses its direction, and thus, its concentration. Therefore, it is essential to focus on one problem to have the desired impact.

Furthermore, the process of analyzing behavior is segmented. Each segment – ideal behavior, actual practice, opportunities, constraints/barriers, and resulting feasible practice and corresponding doable steps – must be fully analyzed before moving on to the next segment. Any missing or incomplete segment will weaken how the feasible practice is determined and, thus, weaken the foundation on which the promotion program is built.

### **ACTIVITY 3.3: DETERMINE FEASIBLE PRACTICES TO PROMOTE**

A focused issue can translate directly into feasible practices that can, in turn, be broken down into smaller, achievable steps that are able to be promoted and adopted.

It is one thing to command, “install new septic tanks” or “build a standard latrine,” but it is another to actually perform that behavior. It is important to provide small steps to achieve the feasible practice.

### **ACTIVITY 3.4: FURTHER SEGMENT AUDIENCES**

People have different beliefs and behaviors. Women perceive things differently than men; young people perceive things differently than older people. By trying to treat everybody the same, it is possible that promotion efforts will reach no one. It is tempting and easier to treat all audiences as if they were alike; however, they are not. People will respond and listen to messages that they feel are speaking directly to them.

Identify the primary, secondary, and, if appropriate, tertiary audiences. The primary audience is the audience at whom the promotion program is directed. Secondary and tertiary audiences are the audiences that can influence whether the primary audience receives and listens to the messages and is able to carry out the practice promoted.

When discussing the work to be done, consider not just the primary audience, but others indirectly involved in, or affected by, a campaign, such as: services providers (plumbers), suppliers (latrine or soap manufacturers), or promoters (health workers). These people who work in the sector are critical to the success of a promotion campaign because they can potentially make or break the practice being promoted. If they are brought on board early, trained, encouraged, and assisted in providing the necessary components, they can work with the promotion program, with the target audience, and within the communities to ensure successful, continued adoption of the promoted practice.

## ACTIVITY 3.5: SELECT APPROPRIATE PROMOTION APPROACHES

All the information and analysis needed to effectively select appropriate promotion approaches is now available. Table 6 below provides promotion approach descriptions.

**TABLE 6: PROMOTION APPROACHES**

Approach	Description	Purpose	Used When:	Illustrative Activities
1. Information and Education	Increases a target audience's awareness, understanding and knowledge about the facts on a particular issue/problem.	Raise Awareness  Inform and Educate	No action is required on the part of the target audience.	<ul style="list-style-type: none"> <li>✓ Provide brochures</li> <li>✓ Display posters</li> <li>✓ Utilize billboards</li> <li>✓ Air TV and radio spots and programs</li> <li>✓ Develop flipcharts</li> </ul>
2. Behavior Change Communication	Raises awareness, provides information and education, builds a conviction that an action is the best choice, and motivates adoption—involves little or no financial commitment.	Persuade  Trigger Action	Personal commitment is required to adopt the action promoted.	<ul style="list-style-type: none"> <li>✓ Develop and enact role plays</li> <li>✓ Utilize puppetry</li> <li>✓ Conduct home visits</li> <li>✓ Distribute leaflets</li> </ul>
3. Social Marketing	Raises awareness, provides information and education, persuades that proposed action is the best choice and prompts adoption—involves significant financial commitment.	Persuade  Trigger Action	The action requires personal and financial commitment to adopt the action promoted.	<ul style="list-style-type: none"> <li>✓ Conduct road shows</li> <li>✓ Provide buttons, stickers, and danglers</li> <li>✓ Organize give-aways</li> <li>✓ Develop “product” jingles</li> </ul>
4. Training	Ensures and/or strengthens a target audience's ability to perform an action, and teaches the skills needed to perform a feasible practice.	Inform and Educate	Skills are required to perform the action promoted.	<ul style="list-style-type: none"> <li>✓ Conduct small group trainings</li> <li>✓ Develop flipcharts</li> <li>✓ Provide demonstrations</li> </ul>

Approach	Description	Purpose	Used When:	Illustrative Activities
5. Advocacy	Advances a target audience's belief that the action proposed is good, effective, and useful to address the issue/problem.	Inform and Educate  Persuade	The target audience needs to be convinced that the action to be promoted is appropriate and the best choice.	<ul style="list-style-type: none"> <li>✓ Hold local theatre</li> <li>✓ Use puppetry, song and dance</li> <li>✓ Hold small group meetings</li> </ul>
6. Mobilization	Allows target audience members to express how they feel about performing the action, to discuss it with other community members, and to discuss how they will continue or start to practice the action.	Inform and Educate  Trigger Action	Community input and approval is required to adopt a particular action and when adopters need to discuss the action.	<ul style="list-style-type: none"> <li>✓ Hold community meetings</li> <li>✓ Display banners</li> <li>✓ Organize contests</li> <li>✓ Conduct participatory hygiene and sanitation transformation</li> <li>✓ Carried out community-led total sanitation</li> </ul>

Any approach—information and education, behavior change communication, social marketing, training, advocacy, or mobilization—can be effective when used appropriately. It is essential to consider the following factors when determining which one approach or combination of approaches to use for a promotion program: gender, age, education, topic, consumer-type, stage on behavior continuum, what is needed to adopt feasible practices, financial cost to customer to adopt feasible practices, and existing barriers and motivators to feasible practices. A detailed assessment and analysis of these factors enables a program to determine which one or combination of approaches to use.

## SUMMARY

We have analyzed the behaviors of our audience—current stages, opportunities, and obstacles—and detailed those behaviors and corresponding achievable steps based on our newly gathered information. Furthermore, we have chosen our approach or combination of approaches so that we can now go on to develop our broad strategy and our specific promotion plan.

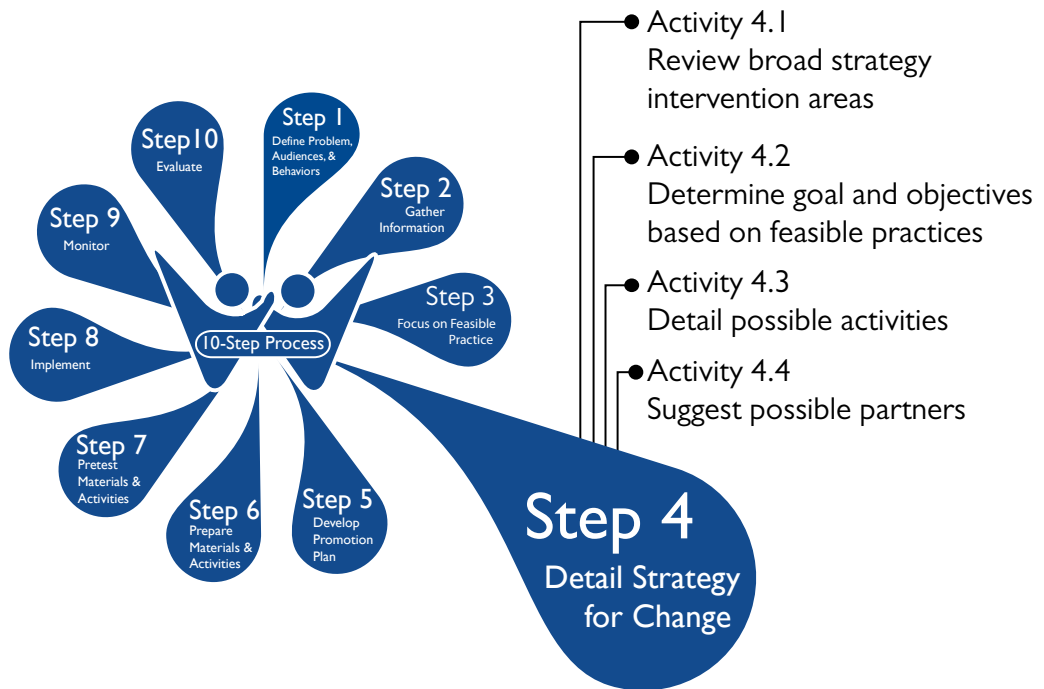


Government officials in East Java, Indonesia, discuss the benefits of improved water, sanitation, and hygiene, and the opportunities to upgrade local conditions. Discussions involving all relevant stakeholders early in the process are critical for developing a comprehensive and broad change strategy.

## STEP 4: DETAIL STRATEGY FOR CHANGE

We now know the feasible practice we plan to promote and with whom we plan to promote it. However, before creating the details of our specific promotion plan, we must develop an overarching strategy to see where our promotion effort fits into the bigger picture. This will allow us to examine other factors, such as infrastructure and enabling environment, that will have an impact on the success of our promotion, as well as determine those who might help us reach our goals and objectives.

### Step 4: Detail Strategy for Change



#### Step 4 Products:

- Product 4: Broad Behavior Change Strategy

## ACTIVITY 4.1: REVIEW BROAD STRATEGY INTERVENTION AREAS

It is vital to identify all related activities that will have an impact on the success of a promotion program. For example, if the feasible practice and thus the promotion rely on a specific product, then that product must be available and affordable for the target audience. In the case that the agency developing and implementing the promotion program does not normally supply the product, then the supply issue should be addressed as part of the broad strategy, and resolved before the specific promotion requiring use of that product can be suggested as an option.

## ACTIVITY 4.2: DETERMINE STRATEGY GOAL AND OBJECTIVES BASED ON FEASIBLE PRACTICES

A goal is a statement describing what the organization or agency wishes to accomplish in a given timeframe and is clearly related to the agency's mission and purpose. Objectives are the details of what exactly is to be done to accomplish this goal. Smart objectives are Specific, Measurable, Achievable, Realistic, Timely – SMART. Behavioral objectives measure a change in behavior and are action-oriented.

Each objective should:

- specify a single **audience**
- specify expected **changes in behavior** of the audience
- list **criteria** against which **success** can be judged
- provide a specific **end point** that determines if the objective has been met
- describe expected **results** in measurable and observable terms
- be **specific and precise**

### SMART Objectives

Smart objectives are Specific, Measurable, Achievable, Realistic, Timely – SMART.

## ACTIVITY 4.3: DETAIL POSSIBLE ACTIVITIES

Under each intervention area, it is useful to detail activities and services required to practice the promoted behavior that do not exist, or an ordinance or by-law to support the effort that is still pending or unenforceable.

In addition, think through some possible promotional activities to carry out in conjunction with the other identified intervention areas. Remember, however, that no promotional activities should be finalized until the Promotion Plan has been fully developed in Step 5.

## ACTIVITY 4.4: SUGGEST POSSIBLE PARTNERS AND STAKEHOLDERS TO CARRY OUT ACTIVITIES

The success of a promotion program is often influenced by the actions of other agencies, and businesses, or promotion programs occurring in the same areas with the same target audiences. Therefore, it is important to be mindful of other locally or nationally related efforts in order to be able to capitalize and build upon them.

### Including Outside Partners

A public utilities firm in India was developing a public sanitation facilities program. They hoped to reduce open defecation in public markets by promoting existing nominal-fee public toilets in four markets of one large urban area. In designing, developing, and carrying out this program, they sought assistance from representatives of the four local market associations, the city-wide small-business association, the country Lion's Club, four non-governmental organizations working in these markets on other projects, two government agencies responsible for building codes and environmental health, and two donor agencies with water and sanitation projects in the country. This collaboration allowed the firm to look beyond what it had planned for its promotion program and include other existing infrastructure, product, and service improvement activities, as well as needed enabling environment activities. Moreover, it allowed the public utilities firm to focus on its promotion activities, knowing that partners were also working toward the same behavioral objectives.

### SUMMARY

We have detailed the big picture related to our promotion effort. We considered other requirements to accomplish the promotion and to enable our audience to adopt and sustain feasible practices. Now that we understand the context, we can turn our attention towards detailing our specific promotion plan.



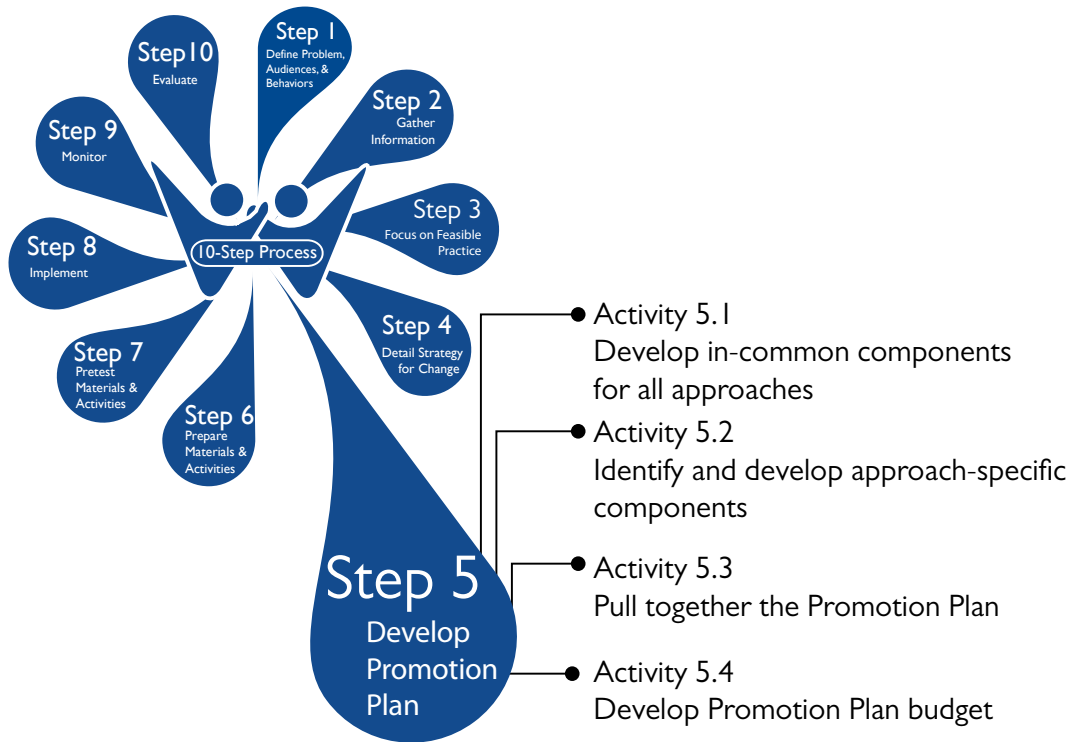
Children practice washing their hands at Phnom Penh's first-ever Water, Sanitation, and Hygiene (WASH) Day. This kind of mobilization event can be an effective component of a plan to change community behavior.



# STEP 5: PREPARE SPECIFIC PROMOTION PLAN

Now we must prepare a blueprint with all the essential information related to the development of our promotion program and its activities. This blueprint or Promotion Plan will, in turn, accurately reflect the behavioral needs of our audience, as well as external opportunities and constraints to consider.

## Step 5: Prepare Specific Promotion Plan



### Step 5 Products:

- Product 5: Promotion Plan, Parts 1-5 Promotion Briefs

## ACTIVITY 5.1: DEVELOP IN-COMMON COMPONENTS FOR ALL APPROACHES

When developing a promotion plan, certain information will be the same for any approach used. They are the common threads that hold the approaches together and combine the materials and activities—we call them the *in-common* components. They include: (1) Problem statement, (2) Objectives, (3) Primary audience, (4) Secondary and tertiary audiences, (5) Key promise and message, (6) Feasible practice(s), (7) Doable steps, (8) Obstacles, (9) Motivators, (10) Tone, (11) Media Channels/Forms, (12) Creative considerations, and (13) Essentials. These components keep the promotion effort focused and phase the promotion program from one stage to the next.

It is easiest to develop, track, and evaluate promotion objectives that reflect feasible practices and doable steps. By linking the program's objectives to feasible practices, the program will make clear progress, and next steps will clearly emerge to direct and motivate the target audience to take action and to adopt new feasible practices.

A key promise and message must be developed for all materials and activities. But how do you begin to create this message? Knowing and understanding the perspective of the primary target audience is essential. This audience will ask: *"If I practice this feasible positive behavior, what positive result will I experience?"* This phrase highlights the most important value or concern of the primary target audience. In answering this question, the key promise and message emerge and provide the audience with the crucial reason(s) to consider the promoted feasible practice, to overcome any barriers, and to adopt the new behavior.

Matching the best available media options for the selected promotion to the target audience's preferred choice will maximize impact and minimize resource inputs. There are four types of media/channels: (1) print, (2) non-print, (3) traditional, and (4) interpersonal. Each type comprises various creative forms or channels, including posters (print), radio spots (non-print), folkdance (traditional), and role plays (interpersonal). Experience has shown that smaller promotion program teams and mid-sized organizations can effectively develop, pretest, and implement up to five forms of media depending on financial and human resources available to them (for example, one poster, one radio spot, one drama, one brochure, and one community meeting agenda/notes).

## ACTIVITY 5.2: IDENTIFY AND DEVELOP APPROACH-SPECIFIC COMPONENTS

Now that all *in-common* components have been developed for the Promotion Plan, it is essential to develop any additional components specific to the promotion effort. For example, an Information and Education or Behavior Change Communication promotion campaign will initially utilize all 13 *in-common* components when developing a Promotion Plan. In addition, either of these types of campaigns may also require additional components that address specific issues on social marketing, training, advocacy, or mobilization (see Table 7 below for more details).

**TABLE 7: COMPONENTS OF PROMOTION APPROACHES**

**13 Components *In-Common* to All Approaches Already Developed:**

(1) Problem statement, (2) Objectives, (3) Primary audience, (4) Secondary and Tertiary audiences, (5) Key promise and message, (6) Feasible practice(s), (7) Doable steps, (8) Obstacles, (9) Motivators, (10) Tone, (11) Media Channels/Forms, (12) Creative Considerations, and (13) Essentials.

Social Marketing	Training	Advocacy	Mobilization
13 <i>in-common</i> components AND: <ul style="list-style-type: none"> <li>• Products</li> <li>• Providers</li> <li>• Persuasion</li> <li>• Pricing</li> <li>• Packaging</li> <li>• Place</li> </ul>	13 <i>in-common</i> components AND: <ul style="list-style-type: none"> <li>• Topics</li> <li>• Skills</li> <li>• Purpose</li> <li>• Materials</li> <li>• Timeframe</li> </ul>	13 <i>in-common</i> components AND: <ul style="list-style-type: none"> <li>• What do they need to hear?</li> <li>• From whom do they need to hear it?</li> <li>• How can the point best be made?</li> </ul>	13 <i>in-common</i> components AND: <ul style="list-style-type: none"> <li>• Activities</li> <li>• Purpose</li> <li>• Role</li> <li>• Needs</li> <li>• Phase</li> </ul>

**ACTIVITY 5.3: PULL TOGETHER THE PROMOTION PLAN**

The Promotion Plan is a compilation of brief parts (see Product 6 in List of Final Toolkit Products). Part 1 applies to any and all approaches used and provides the elements that they all have “in-common”; Part 2 adds the marketing elements, if applicable; Part 3 adds the training elements as required; Part 4 pulls in any advocacy techniques, if needed; and Part 5 provides the details on mobilization schemes, as appropriate. This Promotion Plan is the blueprint and map for all necessary work to be completed. It provides a clear picture of all decisions made and accurately reflects what the audience wants and needs as it relates to organizational priorities and problems identified.

**ACTIVITY 5.4: DEVELOP PROMOTION PLAN BUDGET**

The budget process starts here and is iterated throughout the next five steps of developing a promotion campaign.

**SUMMARY**

We now have clear guidance to develop our promotional materials and activities. We have our key promise and message, our channels, our audience, and our promotional objectives, as well as strategies unique to the approaches we are using. We can develop our effort with the confidence that we will be starting on the right foot with the right audience to have the greatest positive impact.

**CARANYA MUDAH**  
 Hubungi kantor PDAM terdekat  
 atau telepon ke 061 6618349  
 Katakan "Saya mau MENYAMBUNG  
 Keluarga dan lingkungan"  
*Selamatkan Sungai PDAM yang bersih*

061 6618349

**Mudah dibayar ? YA**  
 Bayar dengan tagihan air minum

**Biaya terjangkau ? YA**  
 Biaya bulanan lebih murah daripada biaya  
 tempat pada saat anak sakit

**Penting ? YA**  
 Bayar tagihan secara teratur untuk memastikan  
 anda dan keluarga tetap terlindungi

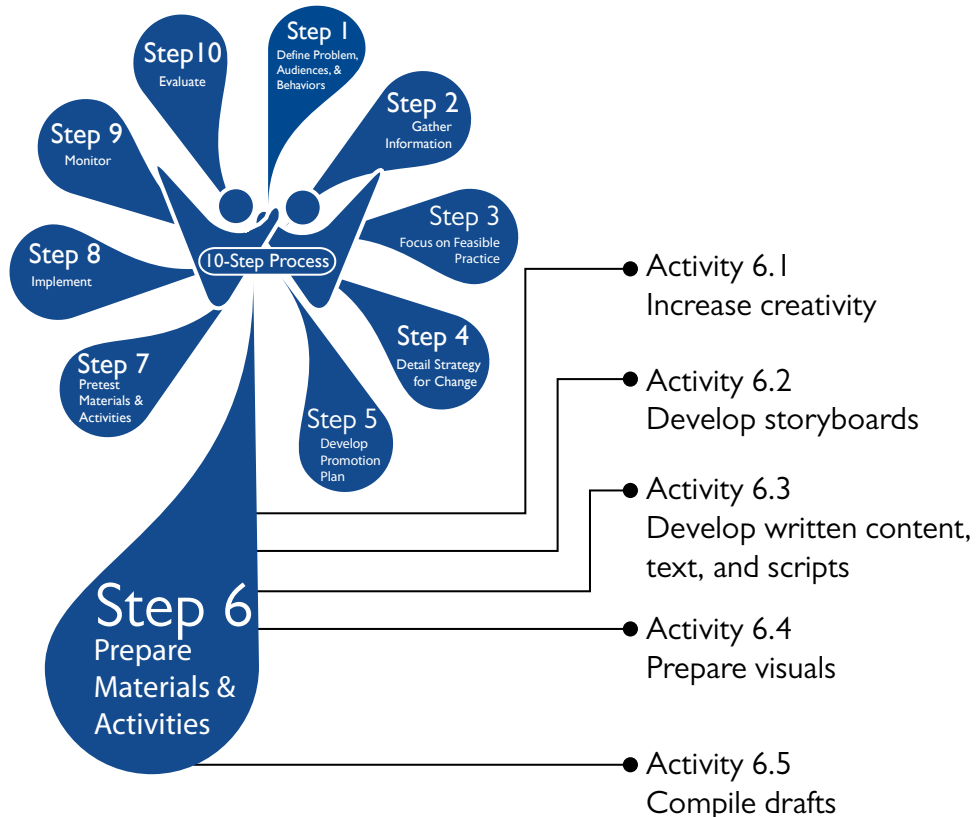
**Bayar agar tetap terlindungi!!**

Residents of Medan, Indonesia, examine a brochure encouraging households to connect to the areas new sewer lines at the launch of the city's promotion campaign. Promotion materials and activities should directly respond to the target audiences concerns and needs.

# STEP 6: DEVELOP PROMOTIONAL MATERIALS AND ACTIVITIES

Now that specifics have been detailed in the Promotion Plan, the Plan can be applied to the development of materials and activities. Each step is a further refinement of essential information and takes the promotion one step closer to providing the target audience with what it needs to understand, try, and adopt the practice to be promoted. Developing materials and activities that accurately reflect these needs as detailed in the Promotion Plan helps to ensure that the audience will respond by ultimately adopting the new feasible practice.

## Step 6: Develop Promotional Materials and Activities



### Step 6 Products:

- No Product; Drafts of All Promotion Materials and Activities

## ACTIVITY 6.1: INCREASE CREATIVITY

Creativity is the ability to conceive and design materials and activities in new and interesting ways. Creative inputs can add the punch needed to get through to the audience and motivate them to listen to the key promise and message and then try a new proposed way of behaving.

### **Creativity in Promotion Campaigns**

#### **Establish a Personality**

Effective promotion invests the product or concept/idea with a vivid, appealing personality that helps it stand out from the crowd. Like a friendly face, it signals genuine values in likeable ways. Building a product/concept personality, however, requires consistency. Advertising, packaging, design, for example, must all speak with the same voice. While awareness of the new figure can be achieved quickly, building personality takes time, as does familiarity and acceptance. But once created, this personality can be the most valuable and enduring asset of a product/concept.

#### **Position Clearly**

Effective promotion makes it instantly clear where the product/concept fits into the audience's life. Is it competing with the audience's lifestyle or values? Is it useful or economical to the audience? Positioning picks the area in which the product/concept is most likely to succeed. It lets the consumer focus quickly on whatever specific benefit is being offered.

#### **Feature the Most Compelling Benefit**

Effective promotion addresses a real need. It speaks as competitively as the facts and good taste allow. It is specific and single-minded. It may use imagery, but it should never overshadow the product and its benefit. The product or concept, not the promotion, should emerge as the star.

#### **Break the Pattern**

Effective promotion excites the ear and the eye with a look and sound of its own. It separates itself from surrounding communications, just as it separates the product or concept from competing products or concepts. It pulls this excitement from the product or concept itself, in ways that reflect the character of the product or concept.

#### **Generate Trust**

A consumer will not buy from a promoter s/he does not trust. Effective promotion, therefore, not only speaks the truth; everything about it rings true. Even when fantasy is used, it must be a fantasy that the audience can share, accept, and find motivating. It is simple, direct, and emphatic.

#### **Appeal to Both the Heart and the Head**

Effective promotion must speak to the heart. A convincing and compelling promotion does more than present practical reasons to try. It invests the message with real emotional values consistent with the product or concept personality.

## ACTIVITY 6.2: DEVELOP STORYBOARDS

A storyboard is a description of written ideas and visual imagery. It describes what will be said in pictures and words, and the order of presentation. A storyboard helps organize the ideas so that the pieces can be moved around and ordered appropriately. Storyboards should be used to create any type of material or activity (see Table 8).

**TABLE 8: SAMPLE STORYBOARD—SAFELY DRINK PIPED WATER**

<b>Subject:</b> Reduce the Boiling of Safe, Piped Water		<b>Date:</b> 7 October 2007
<b>Target Audience:</b> Mothers in female-headed households		<b>Size/No. of Pages/Length:</b> A4, 3-fold, double-sided
<b>Type of Material:</b> Brochure		<b>Developers:</b> Mr. M and Mrs. L
<b>Location: Side 1, Fold 1</b>	<b>Location: Side 1, Fold 2</b>	<b>Location: Side 1, Fold 3</b>
<p><b>Visual Description</b></p> <p>Shows a mother getting a glass of water directly from the tap in her house, with her daughter standing next to her with outstretched hands and her son standing next to the daughter with a glass of water; all are smiling, clean dressed.</p>	<p><b>Visual Description</b></p> <p>Shows various types of taps that people could have from this water service provider.</p>	<p><b>Visual Description</b></p> <p>Shows one man (from agency that assures water quality) inspecting and testing the water, with another woman (maybe same mother from Side 1, Fold 1) giving two thumbs up for quality.</p>
<p><b>Basic Content</b></p> <p>Assure female customers, give facts on the safety of drinking water from the tap.</p>	<p><b>Basic Content</b></p> <p>Continue to give facts on safety and discuss all types of piped water that are safe to drink.</p>	<p><b>Basic Content</b></p> <p>Give information on how, when, and why water is tested and the results; assure customers that trained professionals test the water.</p>
<b>Location: Side 2, Fold 1</b>	<b>Location: Side 2, Fold 2 BACK Flap when folded</b>	<b>Location: Side 2, Fold 4 FRONT Flap when folded</b>
<p><b>Visual Description</b></p> <p>Shows representative of water service provider walking through the village and waving at members of households, and maybe kicking football to small children.</p>	<p><b>Visual Description</b></p> <p>Water service provision representative with mother, son and daughter all enjoying a glass of water together. Logos at bottom in 1 cm circles.</p>	<p><b>Visual Description</b></p> <p>Shows same girl and boy from Side 1, Fold 1, standing together with the boy filling his glass from the tap and the girl drinking water from her glass.</p>
<p><b>Basic Content</b></p> <p>Discuss why the public utility is doing this testing and why they care about the customers; assure again that tap water is safe to drink and that the customer can relax.</p>	<p><b>Basic Content</b></p> <p>Key promise and message only.</p>	<p><b>Basic Content</b></p> <p>Assure them that they can drink tap water safely.</p>

## ACTIVITY 6.3: DEVELOP WRITTEN CONTENT, TEXT, AND SCRIPTS

Written content is the translation of the objectives into phrases and vocabulary appropriate for the audience. Build on what the audience already knows and provide information on what they need to know. The challenge of message design is to combine an appealing and attractive design with a simple, clear, positive, and action-oriented message that is appropriate for and understood by the audience. In the case of actual written content, less is more!

Good content is:

- Directed toward the objective to be attained;
- Clear to the audience;
- Compatible with mental, social, economic, physical capabilities of the audience;
- Specific;
- Accurate;
- Appropriate to the channel selected;
- Appealing, attractive, and timely to the audience;
- Applicable;
- Action-oriented;
- Simple; and
- Consistent.

## ACTIVITY 6.4: PREPARE VISUALS—PHOTOS, ILLUSTRATIONS, SCENERY DESCRIPTION, AND PROPS

Focus on what the promotion campaign is targeting the audience to do. Avoid telling them what not to do. Audiences react negatively to negative images. They can be frustrated, angered, off-put – all emotions which discourage positive behavior change.

## ACTIVITY 6.5: COMPILE DRAFTS

Since all promotional materials and activities must be pretested with the audience, all print, non-print, interpersonal, or traditional materials or activities should not be finalized. Rather, all materials and activities should be prepared in simple draft format to save time and resources. They should look as close to the final product as possible, but do not need to be perfect.

## SUMMARY

We have the drafts of our promotional materials and activities and we are ready to find out what our audience really thinks before we finalize them.







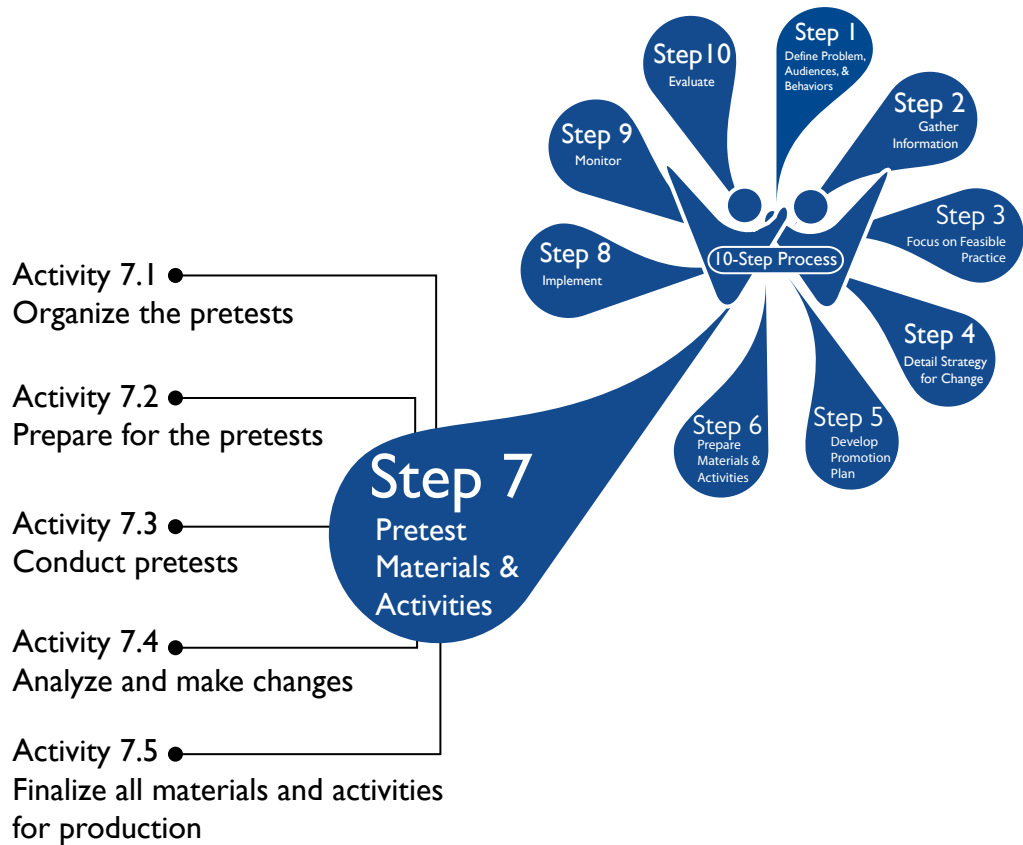
Arie Istandar, ECO-Asia

Women from an informal settlement in Pune, India, form queues to gather water at a local standpipe. Pretesting materials relevant to the actual conditions ensures comprehension, acceptability, and appropriateness of promotional efforts.

# STEP 7: PRETEST AND FINALIZE

Because people see, hear, and interpret messages according to their different backgrounds, education levels, and knowledge, we cannot assume that our messages will be perceived the way they are intended. To ensure that materials and activities developed in any medium are understood, appropriate, and acceptable, we must pretest them with members of the target audience.

## Step 7: Pretest and Finalize



### Step 7 Products:

- No Product; Finalized Promotion Materials and Activities

## ACTIVITY 7.1: ORGANIZE THE PRETESTS

The objective of pretesting is to ensure that at least 80% of the target audience finds the material understandable, acceptable, and appropriate, and is inspired by the material or activity to act.

There are two methods for pretesting: (1) individual (interview), and (2) group (discussion). Pretest only with the audiences for whom the materials or activities are intended. Pretest each material or activity according to the way it is designed (for example one-on-one or in a group). Conduct three rounds, each time with a different set of respondents focusing the pretest only on the changes made since the previous round.

## ACTIVITY 7.2: PREPARE FOR THE PRETESTS

Adequate preparation is the key to successful pretests. Pretest sessions require two-person teams – one interviewer/facilitator and one note taker – for both individual and group pretests of materials and activities. Pretest team members should be unbiased and objective about the materials and activities, so they should not have been involved in the development and design of the materials and activities. It is often difficult to be neutral when conducting a pretest session, as it is our natural inclination to want the respondent to see what we see and have the same interpretation of the visual message. But it is crucial that interviewers curb this tendency by asking very general, neutral, and non-suggestive questions. It is the feelings and opinions of the target audience that matter in this process.

It is essential to prepare the pretest sites and organize all necessary materials before pretesting. This advanced preparation will maximize the best use of time and resources and ensure that all pretests are conducted with the primary target audience(s).

## ACTIVITY 7.3: CONDUCT PRETESTS

Basic pretest protocols are featured below in Table 9 for print, activities, and radio and TV programs and spots.

**TABLE 9: PRETEST PROTOCOLS**

<p><b>Print Protocol:</b></p> <ul style="list-style-type: none"><li>• Show the picture only and ask questions.</li><li>• Show the picture with text and ask questions.</li><li>• Give the entire piece and observe and ask questions.</li></ul> <p><b>Activity Protocol:</b></p> <ul style="list-style-type: none"><li>• Perform/play entire activity.</li><li>• Ask general questions.</li><li>• Perform/play parts of activity</li><li>• Ask part-specific questions.</li><li>• Ask final questions of the whole activity.</li></ul>	<p><b>Radio/TV Program Protocol:</b></p> <ul style="list-style-type: none"><li>• Play the entire program and ask questions.</li><li>• Play the program scene-by-scene and ask questions.</li><li>• Ask final questions.</li></ul> <p><b>Radio/TV Spot Protocol:</b></p> <ul style="list-style-type: none"><li>• Play one entire spot and ask questions.</li><li>• Go to next spot and repeat process.</li></ul>
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## ACTIVITY 7.4: ANALYZE AND MAKE CHANGES

Pretest analysis ensures that at least 80% of the target audience finds the material understandable, acceptable, and appropriate and are inspired by the material or activity. This analysis examines five areas. It is used to identify material and activity weaknesses in each area, and to provide recommendations for fixing each material and activity before the next round of pretests and before finalization. These five areas comprise:

1. Attractiveness: Is the piece interesting?
2. Comprehension: Is it understood? Is it subject to misinterpretation?
3. Acceptability: Is it compatible with cultural norms?
4. Identification: Does the target audience feel the messages are directed at them?
5. Motivation: Do the key promise and message convince the target audience?

Second and third rounds of pretests should be conducted in the same manner, but each subsequent round should focus on the changes made based on previous pretest results (see Table 10).

**TABLE 10: SAMPLE PRETEST ANALYSIS AND REVISION**

Pretest Round: 2 Date: 25/7/07 Material: Brochure for Female-Headed Households Key Promise and Message: "Be at Ease, Drink Your Tap Water Safely"		
Clip/Picture/Scene Text Number	Specific Changes to Make	
	to Picture/Image:	to Text/Script:
Examples: Size A1 [print brochure]	Replace illustration with actual photo of water supply  Mute colors—dull red, soft blue and green	Change water supply to water source

## ACTIVITY 7.5: FINALIZE ALL MATERIALS AND ACTIVITIES FOR PRODUCTION

Meet with production firms, prepare agreements and contracts, and supervise final production and printing to be sure that work retains high quality and stays on target.

### SUMMARY

We have listened to our primary target audience, improved materials and activities based on their feedback, and finalized materials and activities knowing confidently that we are giving our audience what they need to yield the greatest impact.



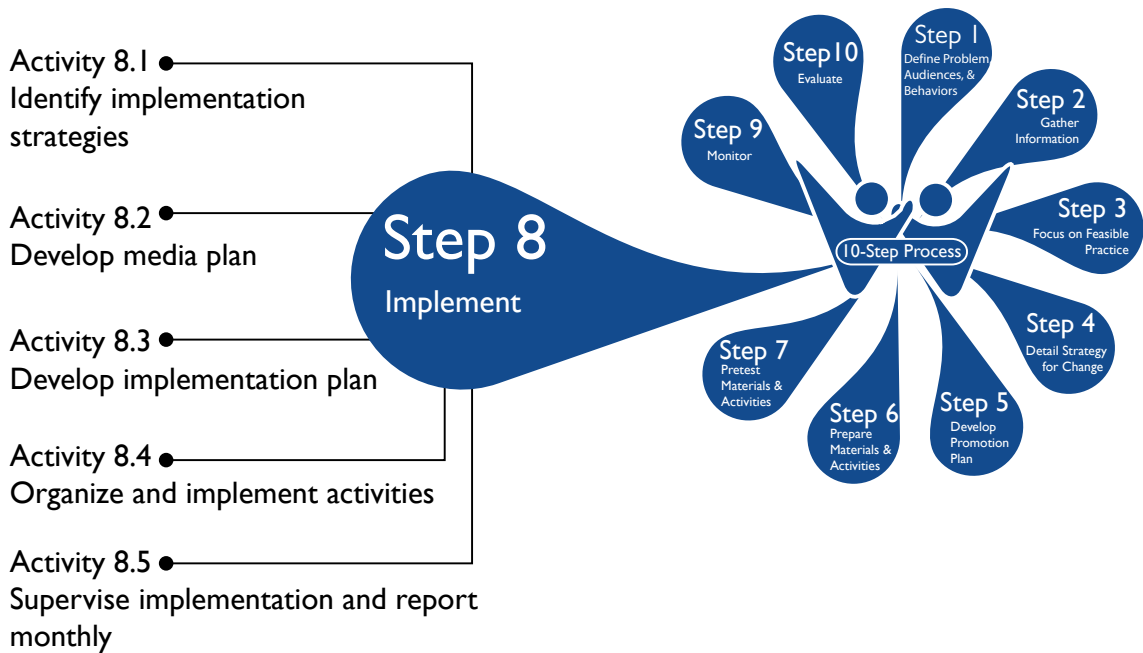
Luke Duggleby, ECO-Asia

Children gather water in a community on the outskirts of Phnom Penh, Cambodia. Effective implementation occurs when a promotion campaign matches the needed or available infrastructure.

## STEP 8: IMPLEMENT

Experience with promotion programs worldwide reveals that a program's launch is both an exciting and a difficult time. No program gets off the ground without some challenges that can be both amusing and frustrating. Efficient planning can minimize frustrations and maximize the successfulness of the program launch.

### Step 8: Implement Promotion Program



#### Step 8 Products:

- Product 6: Media Plan
- Product 7: Promotion Program Implementation Plan

## ACTIVITY 8.1: IDENTIFY IMPLEMENTATION STRATEGIES

Implementation of a promotion program includes three main elements: (1) logistics, (2) media, and (3) supplies. This means assuring that the timing has been discussed and agreed upon; that one person has been assigned responsibility for each issue area; and that activities happen at the right time, with the right people, in the right places.

Two distinct plans must be developed to effectively execute the promotion program – a media plan and an implementation plan.

1. Media Plan – This plan itemizes the specific details of the media activities, including priorities and rationale, budget, production, timing, and logistics. It also allows the person coordinating and supervising the media activities to stay focused on the media distribution, airing, and logistics.

2. Implementation Plan – This plan details both the media and the broader implementation activities, such as program logistics, launching, training, and monitoring and supervision. Furthermore, it allows the program team to oversee the roll out and implementation of all promotion program activities through the final evaluation.

## ACTIVITY 8.2: DEVELOP MEDIA PLAN

The media plan is the core of the promotion program, and as such, it must be developed carefully. To ensure that specific media activities are not overlooked and/or minimized, the media plan should be developed first and separately; its broad activities are then fitted into the implementation plan.

A media plan is comprised of five components: (1) rationale, (2) budget, (3) production, (4) timing, and (5) logistics. A media plan's rationale details the overarching types of media selected for the promotion (non-print, print, interpersonal, and traditional), and the reason for using and/or including each. For example, print will be the most common media used since feasible practices almost always require "how-to" skills that can best be shared in writing. The budget provides an indication, in percentages only, on how the funds will be applied to each type of media (for example, 50% print, 20% non-print, 20% interpersonal, and 10% traditional). Production covers more specifics about each media type and the production numbers (for example, print will include 2 brochures-15,000 copies each, 3 posters-100 copies each and 1 flipchart-15 copies). Timing identifies when each type of media will be aired or used. Last but not least, logistics focus on where materials will be stored, how they will be distributed, and other necessary information.

## ACTIVITY 8.3: DEVELOP IMPLEMENTATION PLAN

Careful development and execution of the implementation plan can minimize frustrations and increase the effectiveness of the overall promotion campaign. Program implementation activities should occur over a three- to four-month period. The implementation plan should incorporate appropriate media, distribution and timing of activities based on the media plan. Because periodic adjustments to this plan may be required, it is important to be flexible.



## ACTIVITY 8.4: ORGANIZE AND IMPLEMENT ACTIVITIES

Staff who will use the materials and activities must be trained in their proper usage. Never assume that everyone knows how to use a flipchart, that everyone knows where to affix a poster, or that providers will know where to place or how to explain a brochure. Non-print materials must be aired on time (that is to say, correct day of the week and time of the day) in all the stations. Print materials must be distributed on time to the right places and the right people.

## ACTIVITY 8.5: SUPERVISE IMPLEMENTATION AND REPORT MONTHLY

Combine supervision of implementation plan with other visits and develop simple observation forms or short questionnaires with three to five questions to maximize resources and minimize time spent on supervision.

## SUMMARY

The moment has come where we have launched our promotional effort. We now watch (monitor) and assess (evaluate) to see if the materials, the activities, and the promotion will have the desired impact on our audience and whether the audience will accept and adopt the promoted feasible practice.



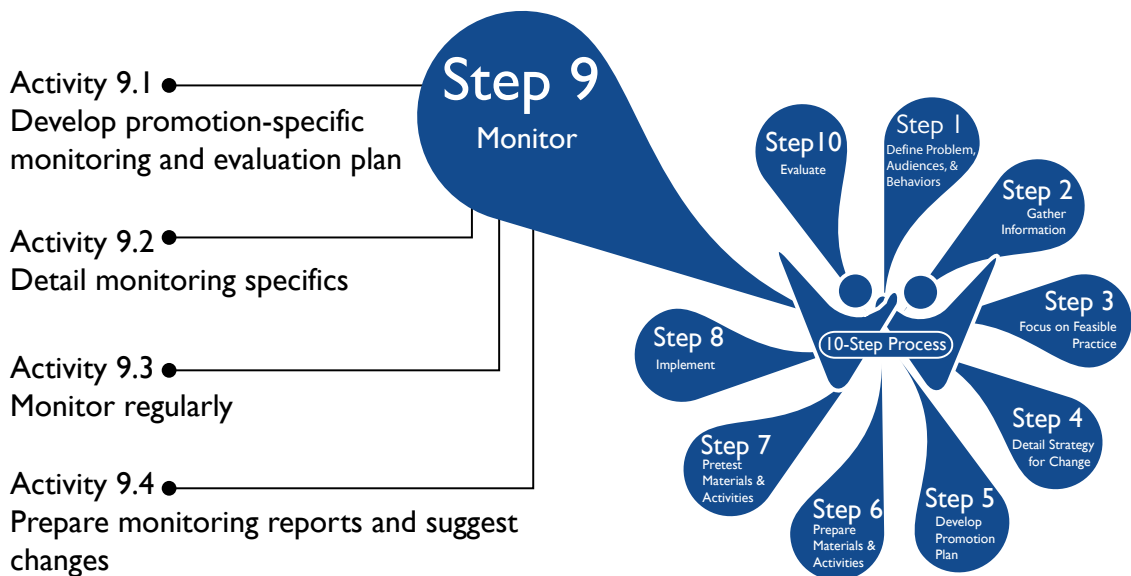
Luke Duggleby, ECO-Asia

A woman in Nuwara Eliya, Sri Lanka, lets water out of her water tank to help municipal staff empty her septic tank. Monitoring the use, maintenance, and continued acceptance of new ideas and technologies is an important step in ensuring the sustainability of promotion efforts.

# STEP 9: MONITOR

We know that monitoring refers to the continual review and supervision of activities, as well as the use of the findings to improve implementation. Monitoring provides us with a valuable tool to identify and correct program problems, direction, and priorities early enough to make changes that maximize the impact of programming efforts.

## Step 9: Monitor Process and Implementation



### Step 9 Products:

- Product 8: Promotion-Specific Monitoring and Evaluation Plan

## ACTIVITY 9.1: DEVELOP PROMOTION-SPECIFIC MONITORING AND EVALUATION PLAN

An effective monitoring and evaluation plan should enable its users to quickly identify and remedy any gaps in the design of the promotion plan, and evaluate the impact of the overall program. While the boundaries of monitoring and evaluation often overlap, they answer different questions and have different purposes. The following table illustrates these differences.

**TABLE 11: MONITORING VS. EVALUATION**

Monitoring	Evaluation
<p>Answers these questions:</p> <p>What is happening to the delivery system/training?</p> <p>Why is it happening? (flaws, gaps)</p> <p>What are the interim effects? (in the target audience, in the personnel, in the service)</p> <p>How can it be fixed, corrected, redesigned?</p>	<p>Answers these questions:</p> <p>What happened as a result of the intervention?</p> <p>What behavior changes took place?</p> <p>What portion of the target audience adopted the new behavior?</p> <p>Why did they adopt it?</p> <p>What was the impact on target audience?</p>
<p>Purposes:</p> <p>Correct, reorient, or redesign delivery systems.</p> <p>Readjust strategy and messages.</p>	<p>Purposes:</p> <p>Demonstrate the impact of program.</p> <p>Determine the level of behavior adoption.</p>
Monitoring Timeline and Staff Responsibilities	Evaluation Timeline and Staff Responsibilities
<ul style="list-style-type: none"> <li>✓ Monitoring begins as soon as possible when a plan is implemented and continues through the intervention.</li> <li>✓ Data are collected periodically, and frequently, at preset intervals or when the occasion permits.</li> <li>✓ The same people implementing the activities customarily do monitoring.</li> <li>✓ Data are analyzed as needed and used immediately for program correction.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Data are generally collected at different points that permit a comparison; baseline and end line.</li> <li>✓ Data collection is planned to allow sufficient time for intervention impact to take place.</li> <li>✓ Researchers, internal or external, are not directly involved in the activities most often conduct research.</li> <li>✓ Data are analyzed and used at a central level after program completion.</li> </ul>

To watch and assess the monitoring and evaluation plan, three types of direct indicators are generally used: (1) impact, (2) outcome, and (3) process. All three indicators should flow directly from the promotional and behavioral objectives developed in the Promotion Plan.

### I. IMPACT

Impact indicators assess a direct result of the outcomes and the process, are much broader in scope than outcomes, and require a long-term monitoring program (at least five years) for results. For example, impact indicators measure a change in overall program objectives:

- Status: percentage increase of child growth rate, percentage decrease in diarrheal diseases;
- Morbidity and mortality; percentage decrease in child morbidity due to diarrheal diseases; and
- Economic status: percentage decrease in monthly household expenditures on diarrheal disease-related products/activities.

## **2. OUTCOME**

Outcome indicators assess a change in something as a result of the promotion program. Outcomes are more specific in scope based on the purpose of the promotion, and evaluate changes in:

- Awareness: percentage of people who can cite hand washing with soap as an important hygiene practice;
- Knowledge: number of people who can name the five critical times to wash hands;
- Attitude: percentage of people who state that hand washing with soap is a vital means to reduce diarrhea;
- Skills: percentage of people who demonstrate the ability to wash their hands properly (properly being well-defined); and
- Behavior: percentage of people who report or are observed washing their hands with soap after defecation.

## **3. PROCESS**

Process indicators assess how well a program is being implemented:

- Training conducted: number of trainings fully completed, number of personnel trained, number of personnel certified;
- Activities conducted: number of activities fully carried out, percentage of target audience participation at these activities;
- Distribution of materials: number of materials distributed/aired (where, when, and according to plan); and
- Distribution of products required: number of products distributed (where, when, and according to plan).

The promotion program needs ten to 15 well-defined and formulated indicators for monitoring and evaluation that cover process, outcomes, and impact. More than 15 are too time consuming and costly to collect data and less than ten provides insufficient indication of impact, outcome, and process of the promotion.

## ACTIVITY 9.2: DETAIL MONITORING SPECIFICS

Process and certain aspects of outcome indicators, such as knowledge, attitudes, and skills, can and should be monitored throughout the life of the promotion program. For a short promotion program of eight months, it is necessary to monitor and report findings monthly, or as often as possible, so that immediate action can be taken to correct activities as needed, and to ensure that distribution, airing, and conduct of activities are taking place on time. Combine monitoring with other regular ongoing activities and develop simple monitoring forms.

## ACTIVITY 9.3: MONITOR REGULARLY

Once the monitoring form is ready, it is critical to train all supervisors who will be required to use it. Training should emphasize how to ask the questions, effective listening, shorthand for completing the form, adding observations of important information not included on the form, and completion and submission of form. If possible, visit at least four different sites every month. Lastly, review the monitoring results within four days of conducting the supervision and monitoring visit.

## ACTIVITY 9.4: PREPARE MONITORING REPORTS AND SUGGEST PROGRAM CHANGES

Periodic monitoring reports allow the promotion team to make needed corrections and adjustments immediately before the promotion effort has been completed. Most importantly, monitoring can help avoid negative impacts that affect the outcome of the entire promotion program.

## SUMMARY

We have been carefully watching to see how our program will be carried out, how our audience responds to our promotion, and if we are succeeding at having any initial impact or behavioral outcomes. Now we can move to our next step and fully assess the impact and outcomes of our promotional effort.





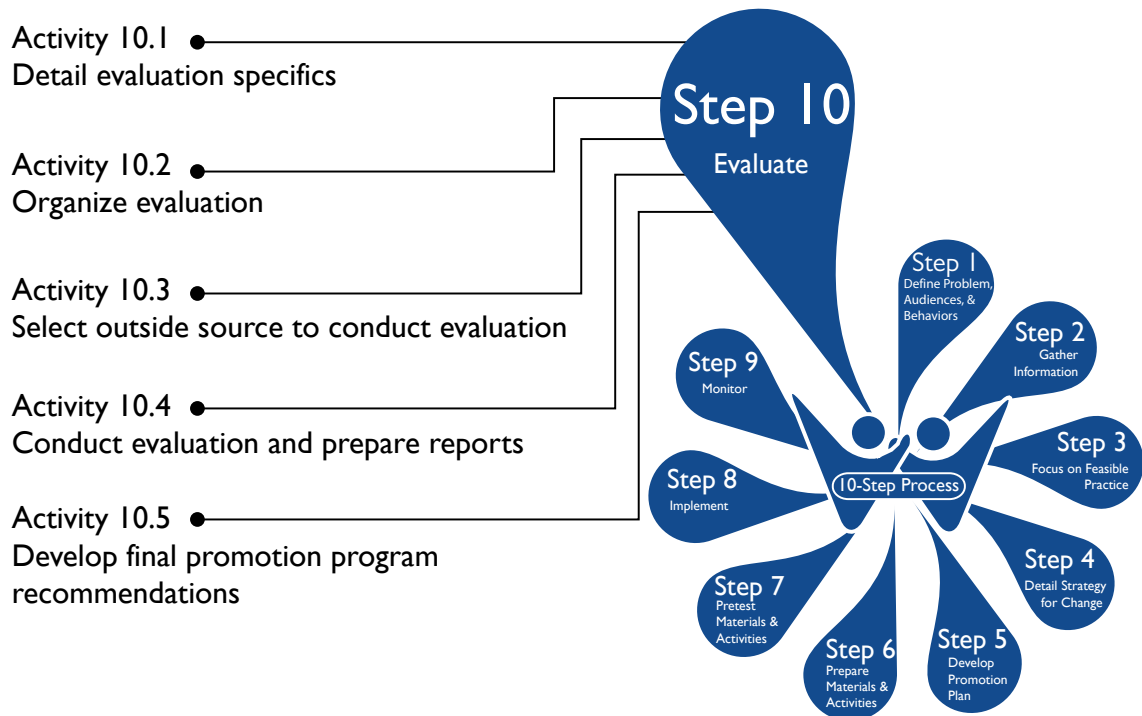
These school boys show off their clean hands at the Water, Sanitation, and Hygiene (WASH) Day event in Marikina City, Philippines. Conducting an evaluation after such an event helps assess the success of the promotion campaign, and identify areas for improvement in future campaigns.



# STEP 10: EVALUATE AND IMPROVE

We know that the purpose of evaluation is to determine to what extent our intervention has been effective. Evaluation findings strengthen the credibility of the methodology, the implementing department, and the overall Promotion Plan. Findings that demonstrate the success of our intervention help to justify the time and care invested in research and planning. All interventions teach something. Mistakes can be detected and avoided. Successes can be shared with others and built upon. Demonstrated impact helps decision makers wisely allocate funds and resources for future programming.

## Step 10: Evaluate Program Success and Improve



### Step 10 Product:

- Product 9: Suggested Promotion Program Changes

## ACTIVITY 10.1: DETAIL EVALUATION SPECIFICS

An evaluation answers the following questions:

- What change occurred?
- How, when, and with which audiences did the changes occur?
- What aspects of the effort contributed to these changes?
- What aspects of the effort should be changed to improve results/management?
- How cost-effective was the effort?
- How did the results of the intervention compare with results of other similar interventions?

Many of the questions from the original research used to design the promotion program can be applied to the evaluation, with some modifications (see Table 12 below for an example).

**TABLE 12: SAMPLE RESEARCH INSTRUMENT ADAPTED FOR EVALUATION**

Original Research Questions	Adapted for Evaluation Purposes
<b>SURVEY</b>	
1. How is it cleaned? 2. How do you reduce the odor in your latrine? 3. How would you describe a “good” latrine?	1. Name three cleaning products available to clean your latrine? 2. Which one(s) do you use? 3. What do you use to reduce the odor in your latrine? 4. Cite three words you would use to describe a “good” latrine.
<b>FOCUS GROUP DISCUSSION</b>	
1. What is a real life hero/leader? How would you define him/her? Why? 2. What does this person do within the community? The neighborhood? Your family? Why? How?	1. Who is presently a leader in sanitation and hygiene? Why? 2. What sanitation and hygiene activities or tasks does this leader promote/carry out within the community? The neighborhood? Why? How?
<b>INTERVIEW</b>	
1. Who is responsible for hygiene within your community? Why? 2. Who should be responsible? Why? How?	1. Who is responsible for hygiene within your community? Why? 2. What activities do they carry out? Why? How?

## **ACTIVITY 10.2: ORGANIZE EVALUATION**

Develop a plan for conducting evaluation(s) of the promotions program that includes a calendar, list of responsibilities and a budget for the evaluation activities. The promotion program team should develop a draft evaluation plan and draft evaluation report format to ensure that the expectations from the evaluation are clear and that the program receives what it needs from the evaluation results.

It is recommended to plan two evaluations during the promotions program – one at the halfway point (interim evaluation) and another at the end of the program (final evaluation).

## **ACTIVITY 10.3: SELECT OUTSIDE SOURCE TO CONDUCT EVALUATION**

To ensure unbiased results and objective recommendations, the promotion program team should consider working with an outside source to conduct the evaluation(s). It is important that the promotion program team develops draft tools, draft monitoring and evaluation plan, and draft report format before working with an outside source. The team needs to take full ownership of the results and clearly guide the evaluation process.

## **ACTIVITY 10.4: CONDUCT EVALUATION AND PREPARE REPORTS**

Evaluation report preparation and finalization should take one month or less.

## **ACTIVITY 10.5: DEVELOP FINAL PROMOTION PROGRAM RECOMMENDATIONS**

As a final step, it is important to: (1) be prepared to learn the results of a promotion program evaluation and effectively apply them; (2) have the flexibility to make the results work for the populations served; and (3) share success stories—the team's success, as well as the successes of the target audiences.

## **SUMMARY**

This last step has enabled us to thoroughly evaluate our program and determine the overall effectiveness of our intervention. We now can see how successful we have been, and know how to continue implementing this promotion program campaign. Having completed all 10 steps, we are ready to build on this success and apply lessons learned to a new promotional phase or program.

# LIST OF DECISION MAKING TOOLS IN THE FULL TOOLKIT

- Decision Making Tool 1.1: Identifying Organizational Priorities
- Decision Making Tool 1.2: Detailing Problem Elements
- Decision Making Tool 1.3: Identifying Audience Characteristics
- Decision Making Tool 1.4: Identifying Ideal Behaviors
- Decision Making Tool 2.1: Determining Information Required to Design Promotion Program
- Decision Making Tool 2.2: Choosing Our Information Gathering Methods
- Decision Making Tool 2.3: Detailing Audience Characteristic Demographics
- Decision Making Tool 2.4: Determining an Appropriate Sample Size
- Decision Making Tool 2.5: Stratifying the Sample Sizes by Audience Characteristics
- Decision Making Tool 2.6: Sample Quantitative Survey for Water, Sanitation and Hygiene
- Decision Making Tool 2.7: Sample Focus Group Topic Guide on Role Models
- Decision Making Tool 2.8: Sample Interview Guide on Sanitation and Hygiene within the Community
- Decision Making Tool 2.9: Sample Survey for Households on Septage Management
- Decision Making Tool 2.10: Keeping in Mind Research Conduct Issues
- Decision Making Tool 2.11: Developing a Research Budget
- Decision Making Tool 2.12: Synthesizing Findings by Ability, Influence, and Motivation Categories
- Decision Making Tool 3.1: Placing Potential Target Audiences on the Behavior Stage Scale
- Decision Making Tool 3.2: Refining the Problem
- Decision Making Tool 3.3: Detailing Target Audiences
- Decision Making Tool 3.4: Identifying ONE Feasible Practice
- Decision Making Tool 3.5: Developing Doable Steps
- Decision Making Tool 3.6: Choosing Promotional Approaches
- Decision Making Tool 4.1: Formulating a Change Strategy Goal
- Decision Making Tool 4.2: Developing Behavioral Strategy Objectives

Decision Making Tool 5.1: Developing Promotion-Specific Objectives

Decision Making Tool 5.2: Developing a Key Promise and Message

Decision Making Tool 5.3: Defining Tone(s) of Promotion

Decision Making Tool 5.4: Choosing Appropriate Media Types and Channels/Forms

Decision Making Tool 5.5: Reducing the Number of Media Forms

Decision Making Tool 5.6: Detailing the Promotion Program Budget

Decision Making Tool 6.1: Thinking Creatively

Decision Making Tool 6.2: Designing a Storyboard

Decision Making Tool 6.3: Texting/Scripting the Materials and Activities

Decision Making Tool 7.1: Pretest Guide for Individuals and Print Materials

Decision Making Tool 7.2: Pretest Guide for Groups and Print Materials

Decision Making Tool 7.3: Pretest Guide for Individuals or Groups and Non-Print Materials

Decision Making Tool 7.4: Pretest Guide for Groups and Activities

Decision Making Tool 7.5: Pretest Individual or Group Participant Screening

Decision Making Tool 7.6: Pretest Demographics Sheet

Decision Making Tool 7.7: Pretest Recording Form

Decision Making Tool 7.8: Pretest Supervision Oversight

Decision Making Tool 7.9: Pretest Summary of Results

Decision Making Tool 7.10: Pretest Analysis and Revision Form

Decision Making Tool 7.11: Producing Final Materials

Decision Making Tool 8.1: Considering Implementation Issues

Decision Making Tool 9.1: Developing Promotion-Specific Monitoring and Evaluation Indicators

Decision Making Tool 9.2: Selecting Methods for Monitoring and Evaluating

Decision Making Tool 9.3: Sample Supervision and Monitoring Collection Form

Decision Making Tool 9.4: Sample Monitoring Report Form

Decision Making Tool 10.1: Sample Evaluation Report Outline

## LIST OF FINAL TOOLKIT PRODUCTS

These products are essential to the success of a promotion program. They enable the promotion team to effectively direct the promotion efforts.

Product 1: Eight-Month Plan of Action

Product 2: Overview of Research, Sections A, B, and C

Product 3: Behavioral Analysis

Product 4: Broad Behavior Change Strategy

Product 5-Brief 1: Promotion Plan

Product 5-Brief 2: Marketing Tactics (Promotion Plan)

Product 5-Brief 3: Training Direction (Promotion Plan)

Product 5-Brief 4: Advocacy Techniques (Promotion Plan)

Product 5-Brief 5: Mobilization Schemes (Promotion Plan)

Product 6: Media Plan

Product 7: Promotion Program Implementation Plan

Product 8: Promotion-Specific Monitoring and Evaluation Plan

Product 9: Suggested Promotion Program Changes

The full *10-Step Promotion Program Toolkit* is available online at:

[www.waterlinks.org/promotion](http://www.waterlinks.org/promotion)

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