



COMPILED DECISION MAKING TOOLS FOR THE FULL TOOLKIT

Decision Making Tool Descriptions

STEP 1:

Decision Making Tool 1.1: Identifying the Focus for the Promotion Effort enables you to detail organizational priorities that can impact on your promotion program choices.

Decision Making Tool 1.2: Detailing Problem Elements provides clear guidance on delineating your problem.

Decision Making Tool 1.3: Identifying Potential Audiences helps select those audiences most appropriate to the problem identified.

Decision Making Tool 1.4: Identifying Ideal Behaviors looks at researching and distinguishing the ideal behaviors that best represent your initial desired behavior change.

STEP 2:

Decision Making Tool 2.1: Determining Information to Gather details specifics to ask in determining what information you have, what you need to gather and how best to do so.

Decision Making Tool 2.2: Choosing Research Methods provides an overview of the methods available and guidance on selecting the two best methods for your information gathering needs.

Decision Making Tool 2.3: Detailing Research Audiences helps you detail audiences to ensure that you gather information from appropriate sources.

Decision Making Tool 2.4: Determining the Sample Size provides a simple method and tables for determining how many quantitative and qualitative respondents should be surveyed or interviewed.

Decision Making Tool 2.5: Summarizing Key Findings provides a set of questions and a simple table format to quickly and easily summarize key research findings.

STEP 3:

Decision Making Tool 3.1: Redefining the Problem and Focusing the Priority Causes guides the process of refining your initial problem and causes so that your promotion can be focused.

Decision Making Tool 3.2: Detailing Target Audiences moves your initial potential, broad audiences to one specific primary target audience for promotion focus and audience segmentation and details appropriate secondary and tertiary audiences.

Decision Making Tool 3.3: Identifying ONE Feasible Practice guides you in detailing the ONE most appropriate and most likely feasible practice to achieve with the one primary audience and to promote.

Decision Making Tool 3.4: Placing Primary Audience on the Behavior Stage Scale allows you to determine where your audience is now – aware, knowledgeable, encouraged, intentional, already acted, evaluated action, or reinforced action – so that you can determine where you want to move them.

Decision Making Tool 3.5: Detailing Current Practices helps you detail present practices and identify and prioritize motivators and barriers to the feasible behavior.

Decision Making Tool 3.6: Choosing Appropriate Promotion Approaches allows you to consolidate all of the decisions taken and choose the best approach or combination of approaches for your promotion – information and education, behavior change communication, social marketing, training, advocacy, and/or mobilization.

STEP 4:



Decision Making Tool 4.1: Formulating a Change Strategy Goal provides a simple format for detailing your broad program goal.

Decision Making Tool 4.2: Developing Strategy Objectives provides a simple format for developing SMART objectives.

Decision Making Tool 4.3: Detailing Broad Intervention Area Activities allows you to think about what other elements will be necessary for your audience to practice the feasible behavior.

Decision Making Tool 4.4: Identifying Possible Partners helps you identify others who might move your effort forward as well.

Decision Making Tool 4.5: Developing Strategy Evaluation Impact Indicators provides a template to develop needed impact indicators.

STEP 5:

Decision Making Tool 5.1: Developing a Key Promise delineates the needed information to develop the ONE key promise to use in ALL of your promotion materials and activities.

Decision Making Tool 5.2: Developing Promotion-Specific Objectives provides guidance on detailing objectives specific to your promotion.

Decision Making Tool 5.3: Defining Tone of Promotion delineates your tone choices and guides your tone selection.

Decision Making Tool 5.4: Choosing Appropriate Media Channels details the types of media and channels available and guides the selection of your choices based on your promotion approaches.

STEP 6:

Decision Making Tool 6.1: Designing a Storyboard guides the development of text/script, and illustrations/scenes for your specific materials and activities and helps you stay focused and organized.

Decision Making Tool 6.2: Texting/Scripting the Materials and Activities details a method to text/script your motivators and support from the Promotion Plan Creative Brief.

STEP 7:

Decision Making Tool 7.1: Screening Pretest Participants offers a format for identifying and screening the primary audience for your pretests.

Decision Making Tool 7.2: Recording Individual Pretests provides a form that can be copied and used to record individual pretests responses.

Decision Making Tool 7.3: Recording Group Pretests details specifics for recording group pretest responses.

Decision Making Tool 7.4: Analyzing and Revising Materials delineates a simple method for analyzing pretest results and provides a tabulation form.

STEP 8:

There are no decision making tools for Step 8.

STEP 9:

Decision Making Tool 9.1: Developing Outcome and Process Indicators uses your promotion-specific objectives and activities and enables you to easily adapt them as outcome and process indicators of success.

Decision Making Tool 9.2: Selecting Methods for Monitoring and Evaluating provides an overview of the methods available and guidance on selecting best methods for your monitoring and evaluation needs.



STEP 10:

There are no decision making tools for Step 10.

Decision Making Tool I.1: Identifying the Focus for the Promotion Effort

Decision Made – Focus of Promotion Effort [Write on **Product 2: Overview of Research, Part A. Research Background**]

TOP PRIORITY is:

1. _____

Instructions for Use: Check those areas in which your organization works. Check all that apply. Once you have checked all the areas in which you work, prioritize those areas based on what you do the most. Prioritize, with 1 (one) as top priority. Prioritize based on funding availability, inclusion of the area in your organizational strategy, whether the area it is a priority issue for your organization, etc. Write your top priority area in the “Decision Made” box above. [See Activity 1.2 for more on how you can later use your second and third priorities.]

| We provide: | Water Areas | Priority Order |
|--------------------------|---|-----------------------|
| <input type="checkbox"/> | 1. Water services to communities on a fee basis or for free | |
| <input type="checkbox"/> | 2. Drinking water/drinking water services to communities on a fee basis or for free | |
| <input type="checkbox"/> | 3. Products for purifying/treating drinking water | |
| <input type="checkbox"/> | 4. Operation and maintenance of water utility infrastructure/supply lines | |
| <input type="checkbox"/> | 5. Products for storing drinking water | |
| <input type="checkbox"/> | 6. Other: _____ | |
| We provide: | Sanitation Areas | Priority Order |
| <input type="checkbox"/> | 7. Services for constructing sanitation facilities | |
| <input type="checkbox"/> | 8. Services for emptying sanitation facilities | |
| <input type="checkbox"/> | 9. Sewerage services | |
| <input type="checkbox"/> | 10. Operation and maintenance of sanitation infrastructure | |
| <input type="checkbox"/> | 11. Products for sanitation services, such as septic tanks or toilet bowls | |
| <input type="checkbox"/> | 12. Other: _____ | |
| We provide: | Hygiene Areas | Priority Order |
| <input type="checkbox"/> | 13. Services for cleaning sanitation facilities | |
| <input type="checkbox"/> | 14. Products for cleaning sanitation facilities | |
| <input type="checkbox"/> | 15. Products for handwashing | |
| <input type="checkbox"/> | 16. Sessions on proper handwashing | |
| <input type="checkbox"/> | 17. Sessions on safe drinking water | |
| <input type="checkbox"/> | 18. Sessions on safe and proper use of sanitation facilities | |
| <input type="checkbox"/> | 19. Other: _____ | |



Decision Making Tool 1.2: Detailing Problem Elements

Decision Made - DRAFT Priority Problem Statement [Write on **Product 2: Overview of Research, Part A. Research Background**]

Instructions for Use: Insert your TOP priority area from Decision Making Tool 1.1 in the first column of the table below. Complete each column based on the problem elements listed in the first row of the table. Avoid assumptions and guesswork. Be as specific as possible under each element, depending on the information **presently** available. If anecdotal information is used, that is to say, information thought or believed, but no evidence is presently available, state such information with “we think/we believe.” Compile the detailed problem elements as a problem statement in the “Decision Made” box above. See the example provided below.

| PROBLEM ELEMENTS | | | | | | | |
|--------------------------------------|--|---|--|--|---|--|---|
| Focus (PRIORITY AREA) | What happens? PROBLEM OR PRACTICE | How much of it happens? DATA | Where does it happen? WHERE | When does it happen? WHEN | To whom does it happen? AUDIENCE | Why does it happen? CAUSE | What are its most important consequences? RESULT |
| | | | | | | | |

Example of a Draft Priority Problem Statement

| PROBLEM ELEMENTS | | | | | | | |
|--|---|-------------------------------------|--|----------------------------------|--|--|---|
| Priority Area in Which We Work (PRIORITY AREA) | What happens? PROBLEM OR PRACTICE | How much of it happens? DATA | Where does it happen? WHERE | When does it happen? WHEN | To whom does it happen? AUDIENCE | Why does it happen? CAUSE | What are its most important consequences? RESULT |
| DRAFT Problem Statement based on elements below: <i>Year-round, in all four peri-urban villages serviced with piped water by our utility, 83.7% of female-headed households with four or more children boil drinking water even though the water has been tested and is safe to drink. These women waste as much as \$1 per day and waste as much as 2 hours per day boiling water. We believe that these households see no value in piped water.</i> | | | | | | | |
| <i>Provide water services on a fee basis</i> | <i>People with piped water service boil drinking water even though tested and safe to drink</i> | <i>83.7%</i> | <i>In all four peri-urban villages served by our organization with piped water</i> | <i>Year-round</i> | <i>Female-headed households; Most with four or more children</i> | <i>Believe that the piped water is still unsafe for drinking; Taught to boil all water for drinking especially that given to children by others Households see no value in piped water</i> | <i>Women waste much money boiling water unnecessarily -up to \$1 per day Don't drink water from pipes Waste 1-2 hours per day boiling water</i> |

Decision Making Tool 1.3: Identifying Potential Audiences

Decision Made - Potential Audience(s) for Research and Target of Promotion
 [Write on **Product 2: Overview of Research, Part A. Research Background**]

1. _____
2. _____
3. _____
4. _____
5. _____

Instructions for Use: Answer each question written at the top of each column to determine who is affected by the identified problem as compiled in Decision Making Tool 1.2. Based on your experience, circle the 5 priority audiences – circle 2 audiences in Column (1), 1 audience in Column (2), 1 audience in Column (3), and the fifth audience in the column of your choice. Prioritize the 5 audiences circled – 1 highest priority to 5 lowest priority. List the 5 potential audiences for research and the target of the promotion above in “Decision Made” in priority order.

| (1) Who is directly affected by the problem identified? | (2) Who is/might have been directly involved in the origins of the problem? | (3) What groups might be useful in solving this problem? |
|--|--|---|
| <i>Example: female-headed households, mothers, service providers, children</i> | <i>Service providers, non-governmental promoters</i> | <i>Teachers, local hygiene promoters and providers, women’s groups</i> |
| | | |
| | | |
| | | |
| | | |
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| | | |

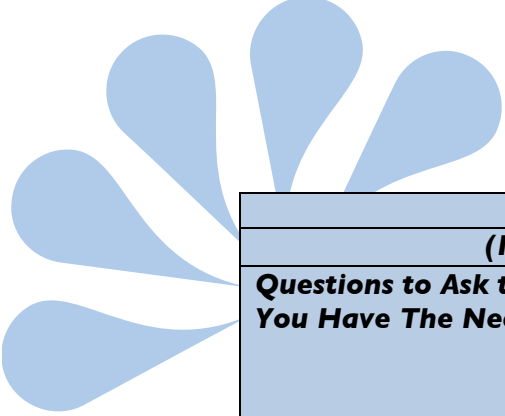
Decision Making Tool 1.4: Identifying Ideal Behaviors

Decision Made – Possible Ideal Behavior(s) to Promote [Write on **Product 2: Overview of Research, Part A. Research Background**]

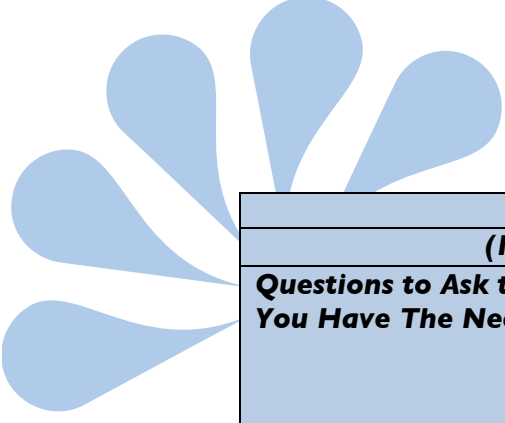
1. _____
2. _____
3. _____
4. _____

Instructions for Use: Using your three previous “Decision Made” boxes (focus, problem statement and potential audiences) from Decision Making Tools 1.1, 1.2, and 1.3; determine what would be the BEST behavioral practice to solve this problem with these potential audiences. Discuss what might be required for the audience to adopt this practice and write these requirements in the table below. Conduct a desk study, if possible, on ideal, international best practice(s) identified to solve this problem. FOCUS on the BEST practice(s), even if it/they is/are not necessarily the most feasible. [The most feasible practice will be determined in Step 3.] Write this ideal behavior(s) in the “Decision Made” box above.

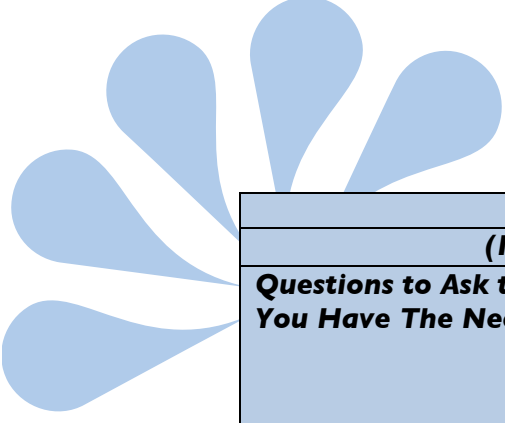
| What are present practices as they relate to the compiled problem statement? (Based on what is presently known, not assumed) | What is ideal behavior desired? |
|---|---|
| <i>Example 1: Mothers boil already safe, piped water before drinking</i> | <i>Use water direct from piped source for drinking.</i> |
| <i>Example 2: Households allow sewerage to seep into groundwater</i> | <i>Dig up septic tanks. Dispose of them safely. Connect to city sewerage lines.</i> |
| | |
| | |
| | |
| | |



| Determining Information to Gather | | | |
|---|---|--|--|
| (1) | (2) | (3) | (4) |
| Questions to Ask to Assess Whether You Have The Needed Information | YES, we have information on our audience | List of Information Sources List report, document, etc. for information you said you had in (2) | Use this type of Research to collect Information YOU DO NOT HAVE QT=Quantitative QL=Qualitative |
| ABILITY | | | |
| 1. To what extent is the target audience(s) aware of the topic or issue? | <input type="checkbox"/> | | QT |
| 2. What does the target audience presently know about the topic or issue? (accurate/ inaccurate) Where/How did they gain this knowledge? | <input type="checkbox"/> | | QT |
| 3. What information have they previously received on this topic? How? Through whom? How would they prefer to receive information on this topic? | <input type="checkbox"/> | | QT |
| 4. What materials presently exist on this topic? For whom? | <input type="checkbox"/> | | QT |
| 5. What providers, suppliers, and promoters presently exist? To what extent is this sufficient? | <input type="checkbox"/> | | QT |
| 6. What outside technical or financial assistance exists to institute this practice within the household or community? From whom or where? | <input type="checkbox"/> | | QT |
| 7. What skills do they think are needed? Do they have these skills? From whom/how did they receive these skills? | <input type="checkbox"/> | | QL |
| 8. What training materials presently exist? For use by whom with whom? | <input type="checkbox"/> | | QL |
| 9. What is the present capacity of providers and/or promoters? | <input type="checkbox"/> | | QT |
| 10. What are the present, actual hygiene practices? | <input type="checkbox"/> | | QT/QL |
| 11. To what extent do they believe they can perform the practice? | <input type="checkbox"/> | | QT |
| INFLUENCE | | | |
| 12. To what extent is the service or product subsidized? By whom? By how much? | <input type="checkbox"/> | | QT/QL |
| 13. What is the present, actual product and/or services use? | <input type="checkbox"/> | | QL |
| 14. What products, infrastructure, | <input type="checkbox"/> | | QT |



| Determining Information to Gather | | | |
|---|---|--|--|
| (1) | (2) | (3) | (4) |
| Questions to Ask to Assess Whether You Have The Needed Information | YES, we have information on our audience | List of Information Sources List report, document, etc. for information you said you had in (2) | Use this type of Research to collect Information YOU DO NOT HAVE QT=Quantitative QL=Qualitative |
| services presently exist to support this behavior? The needed skills? | | | |
| 15.To what extent are these sufficient? | <input type="checkbox"/> | | QL |
| 16.Where is the product, infrastructure, services found? | <input type="checkbox"/> | | QT |
| 17.What characteristics of the product or service do the target audiences feel are practical? What would they change? How? | <input type="checkbox"/> | | QL |
| 18.What do the target audiences like about the product or service? What would they change? How? | <input type="checkbox"/> | | QL |
| 19.What is important to the target audience(s)? Why? | <input type="checkbox"/> | | QL |
| 20.What do they value? Why? | <input type="checkbox"/> | | QL |
| 21.What benefits do they perceive to themselves or their families if they perform, try, purchase, engage in what is being promoted? | <input type="checkbox"/> | | QL |
| 22.What is the present practice within the community on this topic? | <input type="checkbox"/> | | QT/QL |
| 23.To what extent does the target audience comply with this present practice? How do they differ? | <input type="checkbox"/> | | QT/QL |
| MOTIVATION | | | |
| 24.How does the target audience feel about what is to be changed or promoted? | <input type="checkbox"/> | | QL |
| 25.To what extent do they cite or state that they will try the practice, purchase the product? Why? | <input type="checkbox"/> | | QT/QL |
| 26.What do they believe will to the outcome for them if they perform, try, purchase what is being promoted? | <input type="checkbox"/> | | QL |
| 27.How do they feel about this outcome? Why? | <input type="checkbox"/> | | QL |
| 28.What dangers do they perceive to themselves or their families if they perform, try, purchase what is being promoted? | <input type="checkbox"/> | | QL |
| 29.What is the present cost of the services OR products? | <input type="checkbox"/> | | QT |



| Determining Information to Gather | | | |
|--|---|--|--|
| (1) | (2) | (3) | (4) |
| Questions to Ask to Assess Whether You Have The Needed Information | YES, we have information on our audience | List of Information Sources List report, document, etc. for information you said you had in (2) | Use this type of Research to collect Information YOU DO NOT HAVE QT=Quantitative QL=Qualitative |
| 30. What do they presently pay? | <input type="checkbox"/> | | QT |
| 31. How have they prioritized this/these services or products? | <input type="checkbox"/> | | QT/QL |
| 32. What do they cite or state that they would be willing to pay? Able to pay? | <input type="checkbox"/> | | QT/QL |
| INFRASTRUCTURE, PRODUCTS, SERVICE IMPROVEMENTS | | | |
| 33. What infrastructure presently exists? | <input type="checkbox"/> | | QT |
| 34. What products presently exist? | <input type="checkbox"/> | | QT |
| 35. What service improvements are needed? | <input type="checkbox"/> | | QT |
| PROMOTION | | | |
| 36. What promotional efforts are presently being carried out? | <input type="checkbox"/> | | QT/QL |
| 37. Who is carrying them out? | <input type="checkbox"/> | | QT/QL |
| SUPPORTIVE ENVIRONMENT | | | |
| 38. What financing is in place? | <input type="checkbox"/> | | QL |
| 39. What funding mechanisms exist? | <input type="checkbox"/> | | QL |
| 40. What are the present implementing capacities? Among which agencies? | <input type="checkbox"/> | | QT/QL |
| 41. What policies presently exist? | <input type="checkbox"/> | | QT/QL |
| 42. What institutional arrangements are in place? Who is responsible for what? | <input type="checkbox"/> | | QT/QL |

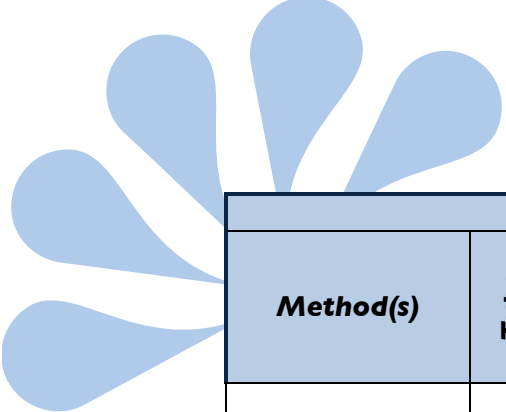
Decision Making Tool 2.2: Choosing Research Methods

Decision Made – TWO Research Methods Selected (Write on **Product 2: Overview of the Research, Part B. Research Design**)

| ONE Quantitative Method | ONE Qualitative Method |
|--------------------------------|-------------------------------|
| | |

Instructions for Use: Select 2 methods – 1 quantitative and 1 qualitative. Read each type below, its advantages and disadvantages and check 1 quantitative method and 1 qualitative method that best matches your research needs. [Though there are more methods, such as participatory rapid assessments, community mapping, etc., which are also useful, the presented methods have proven to be the most reliable for design of a promotion program.]

| Information Gathering Methods | | | | |
|---|--------------|--|---|--|
| Method(s) | Type | What | Advantages | Disadvantages |
| I. Administered Survey <input type="checkbox"/> | Quantitative | <ul style="list-style-type: none"> - Asks a series of questions to determine awareness, attitudes, knowledge, and reported practices - Works best on a single issue - Uses close-ended questions, scaled responses, and multiple choice | <ul style="list-style-type: none"> • identifies attitudes and knowledge • excellent pre/posttest Decision Making Tool • provides factual data • can be used with large numbers of persons • can provide quantitative information | <ul style="list-style-type: none"> • cannot effectively be used with low literate audiences • depending on topic and sample size can be costly and time consuming • cannot predict or show behavior • possible limited value without an interview to qualify the information |



| Information Gathering Methods | | | | |
|--|-----------------------------|--|---|--|
| Method(s) | Type | What | Advantages | Disadvantages |
| 2. Observation <input type="checkbox"/> | Qualitative Quantitative | <ul style="list-style-type: none"> - Looks - Records - Analyzes behavior and actions | <ul style="list-style-type: none"> • does not require conversation • ideal for looking at commonplace nonverbal reactions to media • economical • extremely useful in studying group interactions and communication • can be generalized over time | <ul style="list-style-type: none"> • time consuming • requires patience and sometimes luck • usually requires interaction with another method • cannot effectively evaluate attitude or knowledge • results can be unreliable unless you have a number of observers and can compare results |
| 3. Individual Interview <input type="checkbox"/> | Qualitative | <ul style="list-style-type: none"> - Discusses around a specific topic - Can be structured or unstructured - Gathers personal, sensitive information and behavioral data - Gathers the “what” and “why” | <ul style="list-style-type: none"> • provides qualitative information • allows for personal contact with respondents • provides in-depth information • can be matched with other methods | <ul style="list-style-type: none"> • time consuming • requires skilled interviewer |
| 4. Focus Group Discussion <input type="checkbox"/> | Qualitative | <ul style="list-style-type: none"> - Uses “topic guide” only - Gathers behavioral data - Gathers the “what” and “why” - Encourages social, group interaction and ideas - Can be used to focus individual interviews and surveys | <ul style="list-style-type: none"> • provides qualitative information • allows for personal contact with respondents • provides in-depth information • can be matched with other methods | <ul style="list-style-type: none"> • time consuming • requires skilled interviewer |

Decision Making Tool 2.3: Detailing Research Audiences

Decision Made – Selected Audience Characteristics and Population Total (Write on **Product 2: Overview of the Research, Part B. Research Design)**

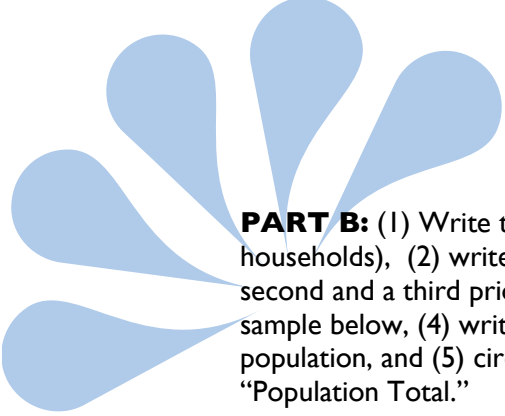
Part A: Characteristics:

- | | |
|----------|----------|
| 1. _____ | 2. _____ |
| 3. _____ | 4. _____ |
| 5. _____ | 6. _____ |
| 7. _____ | 8. _____ |

Part B: Population Total: _____

Instructions for Use: PART A: Read through Columns 1 and 3 “Audience Characteristics to Consider” and add any that are missing for your promotion under “Others.” In Columns 2 and 4, check each characteristic that you have chosen as appropriate for your research audiences. Check all that apply. Write audience characteristics in “Decision Made” box above.

| (1) Audience Characteristics to Consider | (2) Selected this characteristic? | (3) Audience Characteristics to Consider | (4) Selected this characteristic? |
|--|---|--|---|
| 1. Female | <input type="checkbox"/> | 17. Children of any age | <input type="checkbox"/> |
| 2. Male | <input type="checkbox"/> | 18. Children under Five | <input type="checkbox"/> |
| 3. Married | <input type="checkbox"/> | 19. Connected to Sewer lines | <input type="checkbox"/> |
| 4. Single | <input type="checkbox"/> | 20. Connected to Water lines | <input type="checkbox"/> |
| 5. Widowed | <input type="checkbox"/> | 21. Present Customer | <input type="checkbox"/> |
| 6. Head of Household | <input type="checkbox"/> | 22. Potential Customer | <input type="checkbox"/> |
| 7. No education | <input type="checkbox"/> | 23. Has pit latrine | <input type="checkbox"/> |
| 8. Primary education | <input type="checkbox"/> | 24. Has septic tank | <input type="checkbox"/> |
| 9. Secondary education | <input type="checkbox"/> | OTHERS: | <input type="checkbox"/> |
| 10. Post-secondary education | <input type="checkbox"/> | 25. Owner | <input type="checkbox"/> |
| 11. Urban location | <input type="checkbox"/> | 26. Tenant | <input type="checkbox"/> |
| 12. Peri-urban location | <input type="checkbox"/> | 27. Income-Level | <input type="checkbox"/> |
| 13. Rural location | <input type="checkbox"/> | 28. Language | <input type="checkbox"/> |
| 14. Traditional housing area | <input type="checkbox"/> | 29. | <input type="checkbox"/> |
| 15. Formal housing area | <input type="checkbox"/> | 30. | <input type="checkbox"/> |
| 16. Informal housing area | <input type="checkbox"/> | 31. | <input type="checkbox"/> |



PART B: (1) Write the total population in your research site areas (not total number of households), (2) write the total male and female population from this total population, (3) select a second and a third priority characteristic of the research audience from your choices in Part I (see sample below, (4) write the population total for each of these characteristics from the total population, and (5) circle the smallest number and write it above in “Decision Made” box Part B. “Population Total.”

| SAMPLE 25,000 TOTAL Population | | Your TOTAL Population is: | |
|--|-----------------------------|---------------------------------------|------------|
| 150,000 total population in site areas (1) | | (1) | |
| Female | (2) 64,500 | Female | (2) |
| Male | (2) 85,500 | Male | (2) |
| Connected to water lines (3) | (4) 50,000 | Priority Characteristic 1: (3) | (4) |
| Have children under five (3) | (4) 25,000 [(5)smallest] | Priority Characteristic 2: (3) | (4) |

25,000 is the smallest population total and should be written on Part B. of Decisions Made. This population size will be used to determine Research Sample Sizes in Decision Making Tool 2.4.



Decision Making Tool 2.4: Determining the Sample Size

Decision Made – Sample Sizes (Write on Product 2: Overview of the Research, Part B. Research Design)

Total Sample Population (from Decision Making Tool 2.3) is: _____

Part A. Confidence-level: _____%

Part B.

Quantitative Sample Size: _____ = Total quantitative surveys to administer

Qualitative Sample Size: _____ = Total qualitative interviews to conduct

Instructions for Use:

Part A. Selecting a Confidence-Level

Have Confidence in the Research

The **confidence level** tells you how sure you can be of the number of responses you have received. It represents how a certain percentage of the population with the selected characteristics would pick the answers, without needing to research with all members of the population. For example, a 95% confidence-level means you can be certain that 95% of the time, members of this population would respond in this manner. The internationally accepted standard is 95% confidence-level; but most programs, depending on time and resources, can safely adjust this to use 90% or 85%.

- 1) Decide whether you want to have 90% or 85% confidence-level in your research and circle that percentage in Row 3 on both sides of the table in Part B – under quantitative and under qualitative.
- 2) Write your decision above on Part A. “Decisions Made” above.

Part B. Determining Quantitative and Qualitative Sample Sizes

- 1) Using the population total determined in **Decision Making Tool 2.3: Detailing Research Audiences**, circle the number that most closely matches to your population total in Column 3.
- 2) Follow the “population total” row across and the “confidence-level percentage” column down on the Qualitative side of the table and circle/highlight where they meet.
- 3) Follow the “population total” row across and the “confidence-level percentage” column down on the Quantitative side of the table and circle/highlight where they meet

THESE ARE YOUR SAMPLE SIZES for the quantitative and qualitative research.

- 4) Write the determined sample sizes in Part B “Decision Made” box above.

| QUALITATIVE Sample Size Needed | | POPULATION TOTAL (as determined in Decision Making Tool 23) | QUANTITATIVE Sample Size Needed | |
|-----------------------------------|-----|---|------------------------------------|-----|
| 90% | 85% | | 90% | 85% |
| 8 | 4 | 50 | 44 | 33 |
| 12 | 8 | 100 | 80 | 49 |
| 16 | 12 | 150 | 108 | 59 |
| 20 | 16 | 200 | 132 | 65 |
| 24 | 20 | 250 | 152 | 70 |
| 48 | 40 | 500 | 217 | 81 |
| 96 | 80 | 1,000 | 278 | 88 |
| 101 | 90 | 1,500 | 306 | 90 |
| 116 | 100 | 2,000 | 323 | 92 |
| 131 | 110 | 3,000 | 342 | 94 |
| 146 | 120 | 5,000 | 357 | 95 |
| 161 | 130 | 10,000 | 370 | 96 |
| 176 | 140 | 20,000 | 377 | 96 |
| 191 | 150 | 50,000 | 382 | 96 |
| 206 | 160 | 100,000+ | 383 | 96 |

For example, if focus group discussions and interviews were chosen and the total sample size is 40. 10 interviews and 3 focus groups of 10 persons each (30 people) could be conducted or 20 interviews and 2 focus group discussions (20 people) could be carried out.

Decision Making Tool 2.5: Summarizing Key Findings

Decision Made – Completed Quantitative and Qualitative Findings Summary (Attach Summary Table to **Product 2: Overview of Research, Part B. Research Results**)

| Question | | Action to Take |
|--|------------------------------|--|
| Have we completed the needed Summary Table, including BOTH quantitative and qualitative information collected? | <input type="checkbox"/> Yes | IF YES: Attach Summary Table to Product 2: Overview of Research, Part B. Research Results |
| | <input type="checkbox"/> No | Continue onto Step 3 IF NO: Complete Summary Table(s) |

Instructions for Use: Using the sample Table Format provided below, ask the following questions about the gathered information as it is received. Write SHORT PHRASES in answer to each question. Summarize only ONE research audience per table (if you had more than one), combine quantitative and qualitative results. See short sample below and review **Examples 2.5: Sample Qualitative and Quantitative Summary for Water Program in Sri Lanka.**

Current Practice

1. What are they actually, currently doing?

Ability

2. How aware is our target audience of the topic or issue?
3. What do they know? How do they know it? Who/what agency supports this knowledge?
4. What are they able to do? What is needed?
5. To what extent do they believe they are capable of carrying out this practice?

Influence

6. To what extent are needed products and services available? Where, by whom?
7. What characteristics and features of the practice/product/service do they like? In general, what do they like?
8. In general, what influences them/attracts them?
9. What is the community around them doing, practicing, and or purchasing? What is presently acceptable?

Motivation

10. How do they feel about the topic and/or what is being proposed?
11. To what extent do they believe that the topic or practice will change things?
12. Have they indicated any intention to practice what is being promoted?
13. What impact do they feel the practice will have?
14. What risks and/or dangers to they feel will result from practicing what is being promoted?
15. To what extent have they expressed willingness to pay for practice?
16. To what extent are they actually able to pay for practice based on current income, expenses, and spending patterns?

Communication

17. What do they cite as their preferred communication channels? (in order of preference)

SAMPLE: SUMMARY OF KEY FINDINGS

| KEY FINDINGS SUMMARY | | | | |
|--|--|--|--|---|
| Priority Focus: Septic Tank Desludging for fee | | | | |
| Date: April 2010 | | | | |
| Research Audience: Male Heads of Households in Manila, Philippines | | | | |
| Type of Research: <input checked="" type="checkbox"/> Quantitative (86 surveys) <input checked="" type="checkbox"/> Qualitative (30 in-depth interviews) | | | | |
| Current Actual Practices | Ability | Influence | Motivation | Communication |
| <ul style="list-style-type: none"> • 80% desludge every 7-8 years • 65% report septic tank overflows • 23% use “chemical treatment” to desludge • 34% observed households emitted foul odor around tank area | <ul style="list-style-type: none"> • Substantial awareness of need to empty tank • Inadequate knowledge on when and how to desludging • 22% could cite a desludge service | <ul style="list-style-type: none"> • 33% were aware that the local utility provided desludge services • Most stated that their neighbors don’t desludge “either” | <ul style="list-style-type: none"> • Most felt that “desludging” was too expensive to do often • Many stated they would desludge more regularly if it was easy and affordable • 82% cited “improved health” as reason to desludge | <ul style="list-style-type: none"> • 45% like radio • 32% like TV • 87% like to talk to and learn from neighbors • 23% read newspapers • Most stated they preferred personal contact over mass media |

Table Format

| KEY FINDINGS SUMMARY | | | | |
|---|----------------|------------------|-------------------|----------------------|
| Priority Focus: | | | | |
| Date: | | | | |
| Research Audience: | | | | |
| Type of Research: <input type="checkbox"/> Quantitative (## and type) <input type="checkbox"/> Qualitative (## and type) | | | | |
| Current Actual Practices | Ability | Influence | Motivation | Communication |
| | | | | |



Decision Making Tool 3.1: Redefining the Problem and Focusing the Priority Causes

Decision Made –

Part A: Refined Problem Statement (Write on **Product 3: Behavior Analysis)**

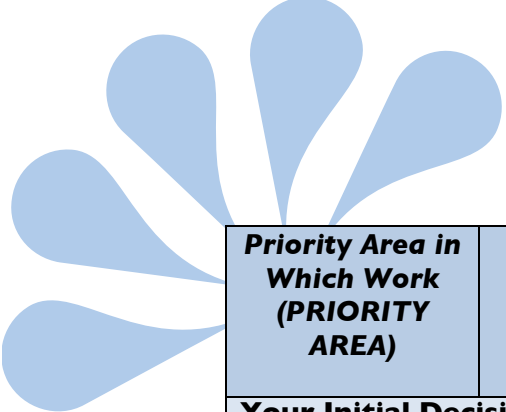
Part B: TWO Focused Priority Causes: (Write on **Decision Making Tool 3.3: Identifying ONE Feasible Practice to Promote, Part A)**

1. _____
2. _____

Instructions for Use:

Part A: Redefine the Initial Problem Statement

Write the initial problem statement in the table below by problem element (as listed in **Decision Making Tool 1.2 Detailing Problem Elements** or **Product 2: Overview of Research**). Write out changes in the initial statement based on the research results. Reformulate and develop a refined problem statement



| Priority Area in Which Work (PRIORITY AREA) | What happens? PROBLEM | How much of it happens? DATA | Where does it happen? WHERE | When does it happen? WHEN | To whom does it happen? AUDIENCE | Why does it happen? CAUSE | What are its most important consequences? RESULT |
|--|-----------------------|------------------------------|-----------------------------|---------------------------|----------------------------------|---------------------------|--|
| Your Initial Decisions from Decision Making Tool 1.2 or Product 2: Overview of Research: | | | | | | | |
| | | | | | | | |
| New Decisions based on Research: | | | | | | | |
| | | | | | | | |
| FINAL Problem Statement: | | | | | | | |

Part B: Examine Causes and Select TWO Priority Causes

In Column 1, write each “**cause**” from the final problem elements (as listed in **Column 7** from the Table above in Part A). Prioritize each “cause” by importance to audience, importance to agency (you), value to audience, and value to agency. Use 1 as lowest and 5 as highest. Total each row and write it in the “Total” column. See the example provided in Row 1.

The TWO causes with the highest totals are the “Two Priorities” to address at present. Write those TWO priority causes in the “Decision Made” box above and on **Decision Making Tool 3.3: Identifying ONE Feasible Practice to Promote, Part A**.

| Causes Why does this Problem happen? | Prioritize based on: | | | | |
|---|-------------------------------|-----------------------------|--------------------------|------------------------|--------------|
| | Importance to Audience | Importance to Agency | Value to Audience | Value to Agency | TOTAL |
| <i>Example: blocked drain pipes are backing up into system causing flooding onto the streets and into homes</i> | 5 | 2 | 1 | 3 | 11 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Distinguishing between Importance and Value

Importance – great impact, significance

Value – worth, usefulness of something, is deserved

For example:

- ✓ An audience may feel they deserve (value) piped water, but they feel that it is of little significance (importance) to their lives, i.e. would rather have septic tanks and flushing toilets.
- ✓ An agency may feel that piped water is significant (importance) to their business, i.e. more customers, more income, but not very useful (value) to their overall portfolio, i.e. more money in sewerage.

Decision Making Tool 3.2: Detailing Target Audiences

Decision Made – Detailed Target Audiences (Write on **Product 3: Behavior Analysis**)

Part A-Our Primary Audience is:

Part B-Our Primary Audience Segmentation includes (you will have at least 9 specific characteristics to effectively segment your primary audience, but you could have more):

| | | |
|-----|-----|-----|
| 1) | 2) | 3) |
| 4) | 5) | 6) |
| 7) | 8) | 9) |
| 10) | 11) | 12) |

Part C-Our secondary audiences are:

Part D-Our tertiary audiences are:

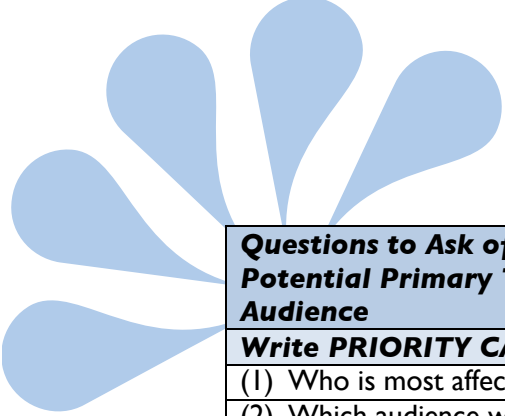
Instructions for Use:

Part A: Determine ONE primary audience – audience at whom the promotion will be targeted.

- Write in the two priority causes as determined in **Decision Making Tool 3.1: Redefining the Problem and Focusing the Priority Causes** on Row 2 of the two tables.
- In each Column on Row 1, write down the audiences as you detailed them in **Decision Making Tool 1.3: Identifying Potential Audiences** or **Product 2: Overview of Research**.
- Read each question in Column 1 and score each potential audience from 1 to 4 (1 least affected – 4 most affected, 1 benefit least – 4 benefit most, 1 least useful – 4 most useful, 1 least responsive – 4 most responsive). Use each number **ONLY ONCE** (see sample below).

| Questions to Ask of Each Potential Primary Target Audience | Audience: Mothers | Audience: Fathers | Audience: Children | Audience: Village Leaders |
|---|----------------------|----------------------|-----------------------|------------------------------|
| Write PRIORITY ISSUE 1 to Address: Insufficient water close to the house | | | | |
| Who is most affected by this issue? | 4 | 2 | 3 | 1 |

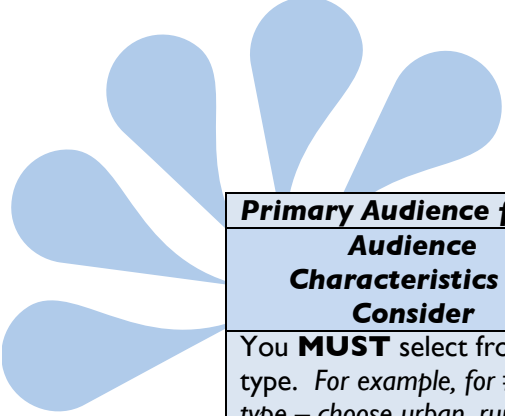
- Respond based on the research gathered. Sub-total each column for each section of the Table. Then TOTAL both sections for each audience.
- Select the **ONE** audience with the **HIGHEST TOTAL score** as the promotion program primary audience.
- Write the decision above in “Decision Made.”
- Go onto Part B to segment this **ONE** primary target audience.



| Questions to Ask of Each Potential Primary Target Audience | Audience: | Audience: | Audience: | Audience: |
|--|------------------|------------------|------------------|------------------|
| Write PRIORITY CAUSE 1 to Address: | | | | |
| (1) Who is most affected by this issue? | | | | |
| (2) Which audience would benefit most from change? | | | | |
| (3) Which audience would be most useful in addressing the priority issue? | | | | |
| (4) Which audience might be most responsive to change on this issue or call for improved practices? | | | | |
| Sub-Total for CAUSE 1 | | | | |
| Write PRIORITY CAUSE 2 to Address: | | | | |
| (1) Who is most affected by this issue? | | | | |
| (2) Which audience would benefit most from change? | | | | |
| (3) Which audience would be most useful in addressing the priority issue? | | | | |
| (4) Which audience might be most responsive to change on this issue or call for improved practices? | | | | |
| Sub-Total for CAUSE 2 | | | | |
| TOTAL Score by Potential Audience: | | | | |
| <i>Audience with the HIGHEST TOTAL score is your priority audience and should be your Primary Target Audience.</i> | | | | |

Part B: Segment primary audience – specific characteristics of our primary audience.

Review the table on the next page. Write in the broad Primary Audience as determined in Part A. Add any “other” characteristics you feel necessary. In Column 2, check “” each characteristic that you feel, based on your research results, MUST be included when developing a promotion for the primary audience. Write specific audience characteristics in “Decision Made” box above.



Primary Audience for this Promotion:

| Audience Characteristics to Consider | Select this characteristic | Audience Characteristics to Consider | Select this characteristic |
|--------------------------------------|----------------------------|--------------------------------------|----------------------------|
|--------------------------------------|----------------------------|--------------------------------------|----------------------------|

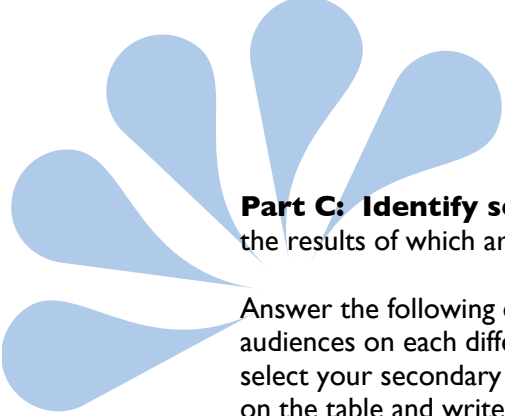
You **MUST** select from each and every characteristic 1 - 10, choosing only ONE from each type. For example, for #1 Gender – choose Female OR Male, not both. For example, for #4 Location-type – choose urban, rural, OR peri-urban, not all three or two, just choose ONE.

| | | | |
|-------------------------------------|--------------------------|---|--------------------------|
| 1. Gender – Pick ONE | | 2. Age of Children – Pick ONE | |
| - Male | <input type="checkbox"/> | - Of any age | <input type="checkbox"/> |
| - Female | <input type="checkbox"/> | - At least one child under 5 | <input type="checkbox"/> |
| 3. Marital Status – Pick ONE | | - Other: _____ | |
| - Married | <input type="checkbox"/> | 4. Location-type – Pick ONE | |
| - Single | <input type="checkbox"/> | - Urban location | <input type="checkbox"/> |
| - Divorced | <input type="checkbox"/> | - Peri-urban location | <input type="checkbox"/> |
| - Other: _____ | <input type="checkbox"/> | - Rural location | <input type="checkbox"/> |
| 5. Age Range – Pick ONE | | - Other: _____ | <input type="checkbox"/> |
| - 15-25 | <input type="checkbox"/> | 6. Housing-type – Pick ONE | |
| - 26-39 | <input type="checkbox"/> | - Traditional housing area | <input type="checkbox"/> |
| - 40-55 | <input type="checkbox"/> | - Formal housing area | <input type="checkbox"/> |
| - 56+ | <input type="checkbox"/> | - Informal housing area | <input type="checkbox"/> |
| - Other: _____ | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |
| 7. Family Size – Pick ONE | | 8. Education – Pick ONE | |
| - Any size | <input type="checkbox"/> | - None | <input type="checkbox"/> |
| - 2- 4 | <input type="checkbox"/> | - Primary/Grade school | <input type="checkbox"/> |
| - 5+ | <input type="checkbox"/> | - Secondary/High school | <input type="checkbox"/> |
| - Other: _____ | <input type="checkbox"/> | - Post-secondary, or University | <input type="checkbox"/> |
| 9. Customer-type – Pick ONE | | 10. Income-Level– Determine Range, then Pick ONE | |
| - Present | <input type="checkbox"/> | - Not important | <input type="checkbox"/> |
| - Potential | <input type="checkbox"/> | - Range _____ | <input type="checkbox"/> |

| Audience Characteristics to Consider | Select this characteristic | Audience Characteristics to Consider | Select this characteristic |
|--------------------------------------|----------------------------|--------------------------------------|----------------------------|
|--------------------------------------|----------------------------|--------------------------------------|----------------------------|

You **MAY** select from characteristics a. - e. or add others needed, as appropriate for your promotion:

| | | | |
|-----------------------------|--------------------------|--------------|--------------------------|
| a. Head of Household | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |
| b. Connected to Sewer lines | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |
| c. Connected to Water lines | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |
| d. Has pit latrine | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |
| e. Has septic tank | <input type="checkbox"/> | Other: _____ | <input type="checkbox"/> |



Part C: Identify secondary audiences – audiences with whom the promotion works and the results of which are used to assist the primary audience in adopting the feasible practice.

Answer the following questions. List 2-3 secondary audiences per question. Feel free to repeat audiences on each different question. Remember: buy-in by all appropriate parties is essential, so select your secondary audiences carefully. Consolidate a complete list of secondary audiences listed on the table and write it on “Decision Made” above.

| Question | Secondary Audiences might include: (BE SPECIFIC) |
|---|---|
| (1) Who might use the messages or use promotion materials and activities (allies)? | |
| (2) Who might be required to ensure that products/services are available to practice the behavior(s) (providers)? | |
| (3) Who might encourage the primary audience to listen and respond to the feasible practice promoted and messages used (influencers)? | |

Part D: Identify tertiary audiences – audiences with whom the promotion shares the work for approval, assistance, policy direction, etc.

Answer the following question and list 2-4 tertiary audiences. Remember: buy-in by all appropriate parties is essential, so select your tertiary audiences carefully. Write these audiences on “Decision Made.”

| |
|---|
| QUESTION: With whom do you need to approve promotion decisions made, ask for policy/direction, assistance, etc.? |
|---|

| |
|--|
| |
|--|



Decision Making Tool 3.3: Identifying ONE Feasible Practice

Decision Made – ONE Feasible Practice to Promote (Write on Product 3: Behavior Analysis)

Instructions for Use:

Part A: “Translate” your priority causes into possible feasible practices

Write the two priority causes identified (**Decision Making Tool 3.1: Refining the Problem and Focusing the Causes, Part B**) in Column I on the table below. A focused cause can be turned directly into feasible practice with simple rewording. See sample on Row I of the table below. Reword each of the issues:

- start with an action verb
- eliminate any repeat words
- be as specific as possible
- be as clear as possible

| Priority Cause | Reworded as Feasible Practice |
|---|--|
| <i>Example: Broken, blocked pipes are causing sewerage flooding onto streets and into homes</i> | - Install new pipes OR - Repair blocked pipes |
| Cause 1: | |
| Cause 2: | |

Part B: Pick priority practice

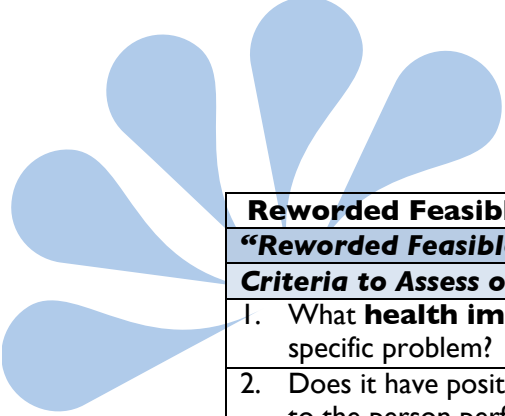
Write each “reworded as a feasible practice” phrases from Part A in Row I of each section of the table on the next page. Rate each feasible practice according to the criteria provided, for the primary audience. Write the number selected in the space provided, choosing only ONE number for each question. When rating each practice, be realistic and objective. Total the rating for each feasible practice. See Partial Sample table below.

The practice with the HIGHEST total score is the practice to promote. Write the ONE priority practice identified in the “Decision Made” box above.

Sample Partial Table (table only includes 6 of the criteria as it is a sample only)

HIGHEST TOTAL PRACTICE IS: Wash hands with soap after using the toilet.

| “Reworded as a Feasible Practice” to Assess: Wash hands with soap before eating | | | | | | |
|---|----------|----------|----------|----------|----------|----------|
| Criteria to Assess on Each Feasible Practice | 0 | 1 | 2 | 3 | 4 | 5 |
| What health impact does the feasible practice have on the specific problem? | | | | | 4 | |
| Does it have a low frequency rate , meaning that the practice does not have to be repeated over and over to have the desired impact? | 0 | | | | | |
| Does it have a low cost , including time, energy, material, financial costs? | | | | | | 5 |
| Is it easy enough or not too difficult? | | | | 3 | | |
| Is it readily observable to an outside evaluator? | | | 2 | | | |
| Is it a sustainable practice? | | | | 3 | | |
| TOTAL = <u>17</u> | 0 | 0 | 2 | 6 | 4 | 5 |
| [0=not at all/none – 5=highly/extremely] | | | | | | |
| “Reworded as a Feasible Practice” to Assess: Wash hands with soap after using the toilet. | | | | | | |
| Criteria to Assess on Each Feasible Practice | 0 | 1 | 2 | 3 | 4 | 5 |
| What health impact does the feasible practice have on the specific problem? | | | | | | 5 |
| Does it have a low frequency rate , meaning that the practice does not have to be repeated over and over to have the desired impact? | | 1 | | | | |
| Does it have a low cost , including time, energy, material, financial costs? | | | | | 4 | |
| Is it easy enough or not too difficult? | | | | 3 | | |
| Is it readily observable to an outside evaluator? | | | 2 | | | |
| Is it a sustainable practice? | | | | 3 | | |
| TOTAL = <u>18</u> | 0 | 1 | 2 | 6 | 4 | 5 |



Reworded Feasible Practice with the HIGHEST score is the practice to promote

“Reworded Feasible Practice #1” to Assess:

| Criteria to Assess on Each Feasible Practice | 0 | 1 | 2 | 3 | 4 | 5 |
|--|----------|----------|----------|----------|----------|----------|
| 1. What health impact does the feasible practice have on the specific problem? | | | | | | |
| 2. Does it have positive effects that are immediately perceivable to the person performing the behavior? | | | | | | |
| 3. Is it compatible with what the person is already doing or will it be acceptable to the community? | | | | | | |
| 4. Are motivators to this behavior easy to support and continue? | | | | | | |
| 5. Are barriers to this behavior easy to overcome and minimize? | | | | | | |
| 6. Does it have a low frequency rate , meaning that the practice does not have to be repeated over and over to have the desired impact? | | | | | | |
| 7. Is it of short duration or require little persistence? | | | | | | |
| 8. Does it have a low cost , including time, energy, material, financial costs? | | | | | | |
| 9. Is it easy enough or not too difficult? | | | | | | |
| 10. Is it readily observable to an outside evaluator? | | | | | | |
| 11. Is it a sustainable practice? | | | | | | |
| TOTAL = _____ | | | | | | |

[0=not at all/none – 5=highly/extremely]

“Reworded Feasible Practice #2” to Assess:

| Criteria to Assess on Each Feasible Practice | 0 | 1 | 2 | 3 | 4 | 5 |
|--|----------|----------|----------|----------|----------|----------|
| 1. What health impact does the feasible practice have on the specific problem? | | | | | | |
| 2. Does it have positive effects that are immediately perceivable to the person performing the behavior? | | | | | | |
| 3. Is it compatible with what the person is already doing or will it be acceptable to the community? | | | | | | |
| 4. Are motivators to this behavior easy to support and continue? | | | | | | |
| 5. Are barriers to this behavior easy to overcome and minimize? | | | | | | |
| 6. Does it have a low frequency rate , meaning that the practice does not have to be repeated over and over to have the desired impact? | | | | | | |
| 7. Is it of short duration or require little persistence? | | | | | | |
| 8. Does it have a low cost , including time, energy, material, financial costs? | | | | | | |
| 9. Is it easy enough or not too difficult? | | | | | | |
| 10. Is it readily observable to an outside evaluator? | | | | | | |
| 11. Is it a sustainable practice? | | | | | | |
| TOTAL = _____ | | | | | | |

Decision Making Tool 3.4: Placing Primary Audience on the Behavior Stage Scale

Decision Made – Place on Stage Scale (Write on **Product 3: Behavior Analysis**)

Our primary audience: (Circle ONE)

Is Aware Knows Encouraged Is Intends to Try Has Tried Has Evaluated Is Reinforced

Instructions for Use: Write, on Row 1, your primary audience (as determined in **Decision Making Tool 3.2: Detailing Audiences, Part A**) and on Row 2 the Feasible Practice to be Promoted (**Decision Making Tool 3.3**). Ask each question and answer it based on research results by circling YES or NO.

WHEN you answer “NO,” **STOP there** – that is **where your audience is**. The stage written next to the NO is where your audience is on the behavior stage scale. Circle the stage in the “Decision Made” above.

| Write in Primary Audience: | | |
|---|------------------------------------|---------------------------------|
| Feasible Practice to Promote: | | |
| Question – Ask yourself each question about your primary audience based on your research results. | Response - Circle “No” or “Yes” | Stage Your audience: |
| 1. Has your primary audience heard about the problem/issue? | No Yes | Is Unaware Is Aware |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 2. Does your primary audience know something accurate about the problem/issue? | No Yes | Is Aware Knows |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 3. Does our audience feel/believe that what is proposed is good, effective, and/or useful to address the problem/issue? | No Yes | Knows Is Encouraged |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 4. Can your audience give reasons to address the problem/issue? | No Yes | Is Encouraged Intends to Try |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 5. Has your audience taken action to address the problem/issue? Adopted your practice to be promoted? | No Yes | Intends to Try Has Tried |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 6. Has your audience assessed how they feel about their experience of the action? | No Yes | Has Tried Has Evaluated |
| <i>If yes, continue to next question. If no, STOP here and circle the stage of your primary audience.</i> | | |
| 7. Does our audience feel it will continue to use or perform the action? | No Yes | Has Evaluated Is Reinforced |
| <i>If yes, YOUR AUDIENCE HAS ACHIEVED reinforcement and there is no need to promote the practice with this audience. If no, STOP here and circle stage of your primary audience.</i> | | |



Instructions for Use:

Part A: Delineate current practices

1. Using the research Summary Table, ask the following questions, quantitatively and qualitatively, of your primary audience (detailed in **Decision Making Tool 3.2: Detailing Target Audiences**) as they relate to the feasible practice determined in **Decision Making Tool 3.3: Identifying ONE Feasible Practice**:
 - What action is actually being taken by our audience NOW?
 - What vocabulary do they use to talk about the action?
2. Write short responses above in “Decision Made” above under “Current Practices.”

Part B: Identify motivators and barriers to the feasible practice

1. Using the research Summary Tables, ask the following questions of your primary audience as they relate to the feasible practice determined in **Decision Making Tool 3.3: Identifying ONE Feasible Practice**:
 - What encouraged/helped them to take the action?
 - What were the results of the action?
2. List as many as appropriate above in “Decision Made” under “Motivators.” Write short responses only.
3. Using the research Summary Tables, ask the following questions of your primary audience as they relate to the feasible practice determined in **Decision Making Tool 3.3: Identifying ONE Feasible Practice**:
 - What difficulties did they have taking the action?
 - What were the results of these difficulties?
4. List as many as appropriate above in “Decision Made” under “Barriers.” Write short responses only.
5. Look at your two lists – Motivators and Barriers. Which one do you have more listed? Motivators? **OR** Barriers? Circle it in the “Decision Made” box above.

Part C: Prioritize motivators and barriers

1. Using the research Summary Tables, examine the **motivators** identified.
2. Identify the **TOP THREE** motivators – the three most often cited by the audience.
3. Number them in priority order in the “Decision Made” box above, after the corresponding Motivator. For example, sewerage connections throughout the city already in place (1).
4. Using the research Summary Tables, examine the **barriers** identified.
5. Identify the **TOP THREE** barriers – the three most often cited by the audience.
6. Number them in priority order in the “Decision Made” box above, after the corresponding Barrier. For example, lack of septage trucks available (1).



Decision Making Tool 3.6: Choosing Appropriate Promotion Approaches

Decision Made – 1 to 3 Approaches Selected Based on Decisions Made (Write on Product 3: Behavior Analysis)

1. _____
2. _____
3. _____

ONE APPROACH OR UP TO THREE COMBINED APPROACHES CAN BE SELECTED.

TO COMPLETE THIS TOOL YOU MUST COMPLETE ALL DECISION MAKING TOOLS IN STEP 3. YOU NEED THE “DECISIONS MADE” INFORMATION TO CIRCLE THE ACCURATE CRITERIA.

If you have not yet completed ALL tools, stop and complete them, then return to choose your approaches.

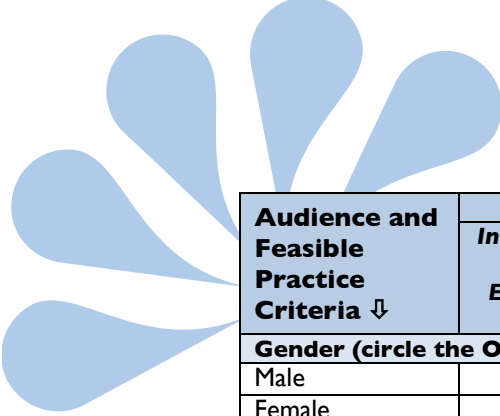
Instructions for Use: Column 1 lists audience and feasible practice criteria used to identify the approach or approaches that best fit your audience, feasible practice, and thus promotion. These criteria should be pulled from decisions made in Step 3 ONLY. The “Xs” in Columns 2-7 indicate which approach “fits best” when particular criteria exist. YOU ARE NOT TO CHOOSE THE “X’s” YOU WISH TO CIRCLE, YOU ARE TO CIRCLE THE “X’s” THAT CORRESPOND TO YOUR CRITERIA.

FOLLOW THE INSTRUCTIONS CAREFULLY.

1. Go down Column 1 and circle the criteria that correspond to your primary audience and your feasible practice, using Decisions Made in Step 3.
2. Once you have circled your feasible practice and audience criteria, follow each criteria row across, circling all Xs in that row.
3. Total the number of X’s circled in each “approach” column and write it at the bottom. The approach with the HIGHEST total IS THE BEST FIT for your promotion effort.

SEE SAMPLE BELOW, AFTER THE TABLE TO BE COMPLETED.

4. If you want to combine approaches, choose up to two other approaches to use based on their total scores – second highest score and third highest score.
5. If you have a tie-score for the HIGHEST total, use both approaches in your promotion.
6. Write the approach(es) above in “Decision Made.”



| Audience and Feasible Practice Criteria ↓ | Approaches | | | | | |
|--|---------------------------|-------------------------------|------------------|----------|----------|--------------|
| | Information and Education | Behavior Change Communication | Social Marketing | Training | Advocacy | Mobilization |
| Gender (circle the ONE in Column I that corresponds to your primary audience) | | | | | | |
| Male | X | - | X | X | - | - |
| Female | - | X | X | X | X | X |
| Age (circle the ONE in Column I that corresponds to your primary audience) | | | | | | |
| Children | X | - | - | - | - | X |
| Teens | - | X | - | - | - | X |
| Young Adults | - | X | X | X | - | X |
| Adults | - | X | X | X | X | X |
| Education (circle the ONE in Column I that corresponds to your primary audience) | | | | | | |
| None | - | X | X | X | - | X |
| Primary | - | X | X | X | - | X |
| Secondary | X | X | X | X | - | - |
| Post-secondary | X | X | X | - | X | - |
| Audience-Type (circle ALL in Column I that apply to your primary audience) | | | | | | |
| Private | X | - | X | - | X | - |
| Public | X | - | - | - | X | X |
| Commercial | X | - | X | - | - | - |
| Government | X | X | - | - | X | - |
| Household | X | X | X | X | - | X |
| Individual | X | X | X | X | - | X |
| Stage on Scale (circle the ONE in Column I that correspond to your primary audience) | | | | | | |
| Is Aware | X | - | - | - | - | X |
| Knows | X | - | - | - | - | X |
| Is Encouraged | - | X | X | - | - | X |
| Intends to Try | - | X | X | X | - | - |
| Has Tried | - | X | X | - | - | - |
| Has Evaluated | - | - | - | - | X | - |
| Barrier and Motivators that Exist to adopt Feasible Practice (circle ONE in Column I) | | | | | | |
| More Barriers Exist | - | X | X | - | X | - |
| More Motivators Exist | X | X | - | X | - | X |
| Needed to Adopt Feasible Practice (circle ALL in Column I that apply) | | | | | | |
| Products | - | - | X | X | - | - |
| Infrastructure | X | - | - | X | X | - |
| Service Improvements | X | - | - | X | X | X |
| Consumer Skills | - | X | - | X | - | - |
| Financial Cost to Consumer of Feasible Practice (circle ONE in Column I) | | | | | | |
| High | - | - | X | - | X | X |
| Medium | - | - | X | X | X | X |
| Low | X | X | - | X | - | X |
| None | X | X | - | - | - | - |
| TOTAL Xs | | | | | | |

Decision Making Tool 4.1: Formulating a Change Strategy Goal

Decision Made – Strategy Goal Developed (Write on *Product 4: Broad Change Strategy*)

Instructions for Use: Use Row 2 instructions to create **ONE** goal for the change strategy. Follow the instructions **CAREFULLY**, completing one column at a time. Add nothing new in Columns 2, 3, 5 or 7, **JUST PICK ONE AND CIRCLE IT**. Write the Goal formulated in “Decision Made” above.

| Strategy Goal Development | | | | | | |
|---|------------------------|--|---|---|--|---|
| 1 Organization Name | 2 | 3 Action to Take | 4 Focus Area | 5 | 6 Audience | 7 Timeframe |
| Write your organization name below | Add this phrase | PICK ONE and circle the verb that best matches the broad action to be taken | Write in below the ONE priority focus area identified Decision Making Tool 1.1: Identifying the Focus for the Promotion Effort or Product 2: Overview of Research | PICK ONE and circle | Write in the MAIN broad audience identified in Decision Making Tool 1.3: Identifying Potential Audiences or Product 2: Overview of Research | PICK ONE from each list and circle: |
| | intends to | <ul style="list-style-type: none"> - Strengthen - Foster - Expand - Enhance - Augment - Improve - Heighten - Encourage - Extend | | <ul style="list-style-type: none"> - for - with - by - of | | <ul style="list-style-type: none"> - in - over - by end of <p>AND</p> <ul style="list-style-type: none"> - 3 years - 5 years - 10 years |
| Example: ECO-Asia | intends to | strengthen | access to sewerage desludging services | for | sewerage public utilities customers in five Asian countries | over 5 years |

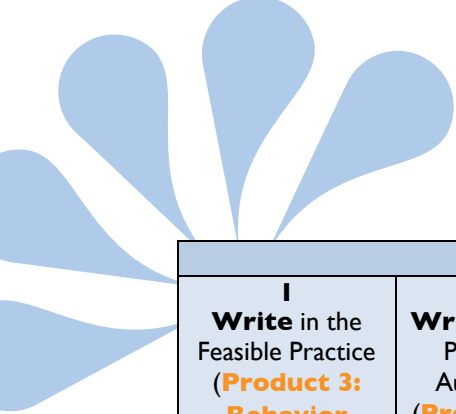
Decision Making Tool 4.2: Developing Strategy Objectives

Decision Made – 2 to 4 Strategy Objectives (Write on *Product 4: Broad Change Strategy*)

1. _____
2. _____
3. _____
4. _____

Instructions for Use: Use Row 1 instructions to develop 2 to 4 strategy objectives. Follow the instructions CAREFULLY, completing one column at a time. Add nothing new in Columns 5 or 6, JUST PICK ONE AND CIRCLE IT. Write the objectives formulated in “Decision Made” above.

| EXAMPLE - Strategy Objectives Development | | | | | | |
|--|--|---|---|--|--|--|
| 1 Write in the Feasible Practice | 2 Write in the Primary Audience | 3 <u>Specific</u> What action do you expect your audience to take? | 4 <u>Measurable</u> How much of a change do you hope for in EACH action? | 5 <u>Achievable</u> How will you assess that the “measurable” was achieved? | 6 <u>Realistic</u> What practical and sufficient way can you indicate that the feasible behavior is being practice? | 7 <u>Timely</u> By when do you hope to see this change? |
| By end of 2010: (1) increase the percentage of mothers of children under five washing their hands with soap after using the toilet from a reported 20% to 45% once daily (2) double the number of observed mothers of children under five who wash their hands with soap before eating twice daily | | | | | | |
| Wash hands with soap at two critical times | Mothers of children under five | <u>Action 1:</u> Wash with soap after using the toilet | Increase from 20% to 45% | Reported (through survey) | Once daily | By end of 2010 |
| | | <u>Action 2:</u> Wash with soap before eating | Double number | Observed | Twice daily | |



| Strategy Objectives Development | | | | | | |
|--|---|---|--|---|---|--|
| 1 Write in the Feasible Practice (Product 3: Behavior Analysis) | 2 Write in the Primary Audience (Product 3: Behavior Analysis) | 3 <u>Specific</u> What action do you expect your audience to take? Write it below, by action. | 4 <u>Measurable</u> How much of a change do you hope for in EACH action? Write it below, by action. (See sample Objective verbs below for choices.) | 5 <u>Achievable</u> How will you assess that the “measurable” was achieved? Pick ONE and circle, by action. | 6 <u>Realistic</u> What practical and sufficient way can you indicate that the feasible behavior is being practice? Write it below, by action. (See sample words below for choices of wording) | 7 <u>Timely</u> By when do you hope to see this change? Write it below, by action. (shorter-term than the strategy length, usually yearly throughout the strategy period) |
| | | Action 1: | | - Reported - Observed | | |
| | | Action 2: | | - Reported - Observed | | |
| | | Action 3: | | - Reported - Observed | | |
| | | Action 4: | | - Reported - Observed | | |
| | | | “Measurable” verbs to choose from: -Decrease -Double -Triple -Increase -Reduce | | “Realistic” words to choose from and/or combine: -Daily -Once -Twice -Monthly -Weekly | |

Decision Making Tool 4.3: Detailing Broad Intervention Area Activities

Decision Made – Needed Broad Strategy Activities (Write on *Product 4: Broad Change Strategy*)

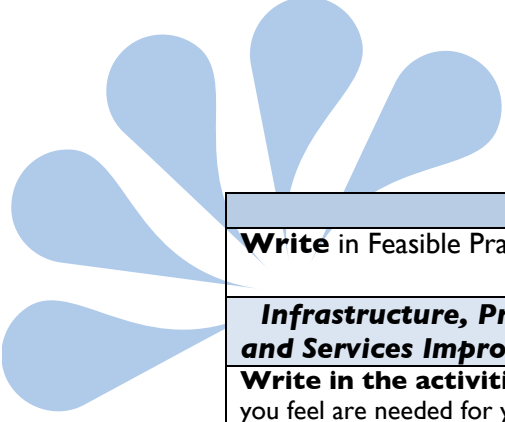
| Infrastructure, Products and Services Improvements | Promotion | Supportive Environment |
|---|------------------|-------------------------------|
| | | |

Instructions for Use: Follow each row and column, completing the instructions as indicated. Write your BROAD activities in the table under “Decision Made.”

Tips for thinking about these broad activities:

- (1) Keep in mind the strategy goal and objectives.
- (2) Remember these broad activities are activities that might be needed by your promotion program to allow the audience to adopt the feasible practice; that is to say, specific activities under each intervention area that you feel will impact on the success of the promotion and that need to be addressed.
- (3) Express as activities. For example, if the feasible practice is “*clean and maintain latrines properly,*” the activity might be “open kiosks devoted solely to sanitation supplies” or “create a cadre of door-to-door sanitation supply sales women.” See more samples in the table below.

| Detailing Broad Intervention Area Activities | | |
|--|--|--|
| Write in Feasible Practice (Product 3: Behavior) as a reminder: | | |
| Infrastructure, Products and Services Improvements | Promotion | Supportive Environment |
| Write in the activities that you feel are needed for your audience to practice the feasible practice being promoted. | Write in the names of the approaches selected in Product 3: Behavior Analysis . [Nothing further to decide now, promotion activities will be detailed in Step 5, Promotion Plan.] | Write in the activities that you feel are needed for your audience to practice the feasible practice being promoted. |
| Examples of Types of Broad Activities to detail now: -Provide new trucks for desludging -Investigate drilling equipment -Install new water mains -Develop new plastic basins -Upgrade water treatment plants -Build new sewerage treatment plant -Repair main pipelines | Examples: -Training -Mobilization -Behavior Change Communication | Examples of Types of Broad Activities to detail now: -Develop new enforcement policy -Create division of low-income affairs -Develop and conduct quality customer service training program for staff and partners -Investigate funding mechanisms for loans -Develop voucher system |



| Detailing Broad Intervention Area Activities | | |
|---|--|---|
| Write in Feasible Practice (Product 3: Behavior) as a reminder: | | |
| Infrastructure, Products and Services Improvements | Promotion | Supportive Environment |
| Write in the activities that you feel are needed for your audience to practice the feasible practice being promoted. | Write in the names of the approaches selected in Product 3: Behavior Analysis . [Nothing further to decide now, promotion activities will be detailed in Step 5, Promotion Plan.] | Write in the activities that you feel are needed for your audience to practice the feasible practice being promoted. |
| | | <i>-Form steering committee</i> |

Decision Making Tool 4.4: Identifying Possible Partners

Decision Made – List of Possible Partners with Possible Role (Write on **Product 4: Broad Change Strategy**)

| | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

Instructions for Use:

- 1) Have **Product 3: Behavior Analysis** available to review.
- 2) On a separate piece of paper, list organizations, non-governmental programs, businesses, associations, groups, individuals, and governmental agencies that are involved in the same type of work as your strategy activities.
- 3) Circle those which should be included as possible partners in your strategy. Remember: buy-in by all appropriate parties is essential, so select your partners carefully.
- 4) Insert the names of those organizations circled in #2, which could be possible partners under each appropriate intervention area in the table below.
- 5) After each organization name, decide how they might be involved and write the category that applies to the role they might play: Technical assistance, Training, Financing, Outreach, Services and delivery, Transportation, Storage, Distribution, Other
- 6) Write your possible partners noting their role in parenthesis under “Decision Made.”

| Intervention Area 1: Infrastructure and Products and Service Improvements | Intervention Area 2: Promotion | Intervention Area 3: Supportive Environment |
|--|---|--|
| <i>Example: World Bank (construction)</i> | <i>UNICEF (training)</i> | <i>Ministry of Health (policy revision)</i> |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Decision Making Tool 4.5: Developing Strategy Evaluation Impact Indicators

Decision Made – 2 to 3 Strategy Evaluation Impact Indicators (Write on *Product 4: Broad Change Strategy*)

1. _____
2. _____
3. _____

Instructions for Use:

- 1) Review the example below based on the Goal example from **Decision Making Tool 4.1: Formulating a Change Strategy Goal**.
- 2) Write your developed goal from **Decision Making Tool 4.1** on Row 1.
- 3) COMPLETE COLUMN 3 first. Answer the two questions and insert up to three answers in the three rows provided (one answer per row). Have 1 to 3 impacts ONLY.
- 4) For Columns 1 and 2, PICK ONE and circle, as appropriate for each impact listed in Column 3. Add nothing new, just pick one and circle it.
- 5) Formulate your impact indicators as shown in the example and write them under “Decision Made” above

| Your Goal: | | |
|--|--|--|
| 1 PICK ONE - Percentage or Number - AND CIRCLE | 2 PICK ONE <u>Verb</u> AND CIRCLE | 3 Impact - What might be the result if you achieve your goal? - What might be the result for the primary audience if you achieve your goal? |
| <input type="checkbox"/> Percentage <input type="checkbox"/> Number | <ul style="list-style-type: none"> • Decrease in • Reduction of • Increase in | |
| <input type="checkbox"/> Percentage <input type="checkbox"/> Number | <ul style="list-style-type: none"> • Decrease in • Reduction of • Increase in | |
| <input type="checkbox"/> Percentage <input type="checkbox"/> Number | <ul style="list-style-type: none"> • Decrease in • Reduction of • Increase in | |
| <p>EXAMPLE GOAL: Over 5 years, ECO-Asia intends to strengthen access to sewerage desludging services for public utility customers in five Asian countries.</p> <p>Possible Impact Indicators:</p> <ul style="list-style-type: none"> (1) percentage decrease in wasted sanitation expenses (2) percentage reduction of pollutants to groundwater (3) number increase in population using hygienic sanitation facilities | | |



Decision Making Tool 5.1: Developing a Key Promise

Decision Made – KEY PROMISE and MESSAGE (Write on *Product 5: Promotion Plan, Part A. Creative Brief*)

| <i>1</i> ONE Key Promise (WHY do it) | <i>2</i> Feasible Practice (WHAT to do) |
|--|---|
| | |

YOUR ONE KEY PROMISE AND THE FEASIBLE PRACTICE (YOUR MESSAGE) MUST BE ON EACH AND EVERY PIECE OF PROMOTION MATERIAL AND ACTIVITY.

Instructions for Use:

- 1) Write the feasible practice to be promoted from **Product 5: Promotion Plan, Part A. Creative Brief** in Column 2 in the “Decision Made” box above.

[**PLEASE NOTE:** Your ONE Feasible Practice and Key Message are the SAME. For example, if you feasible practice as determined was “use water from safe sources,” then your Key Message for this Promotion is “Use Water from Safe Sources.”]

- 2) Now follow each part below and complete the tables to develop the KEY PROMISE for your promotion.
- 3) Write the developed Key Promise in the “Decision Made” box above.

PART A: Identify primary audience priority appeal

- 1) Review the priority motivators from **Product 5: Promotion Plan, Part A. Creative Brief**. Write each in Row 1 next to “Top Three Priorities.”
- 2) Determine the most important appeal for the audience to encourage them to adopt the feasible practice by answering each of the questions and putting a “√” in under the Priority that best answers the question.
- 3) Answer based on the quantitative and qualitative Summary of Key Findings. There should only be ONE “√” per row/question.
- 4) Total the “√’s” in each column and write the Total number in the last row for each Priority.
- 5) If you have a tie, repeat #2) to #4) with the two priorities that tied.
- 6) The priority with the most “√’s” is the **PRIORITY APPEAL**. Write it below and continue onto Part B.

| Top 3 Priorities → | 1. | 2. | 3. |
|--|-----------|-----------|-----------|
| According to the Primary Audience: | | | |
| 1. Which appeal was mentioned most often? | | | |
| 2. Which appeal was best described? | | | |
| 3. Which appeal was most often positive? | | | |
| 4. Which appeal is most unique? | | | |
| 5. Which appeal was important to most audiences? | | | |
| 6. Which appeal was most often described? | | | |
| TOTAL “√” Marks | | | |
| The PRIORITY appeal is: _____ | | | |

PART B: Detail ONE KEY PROMISE based on the Priority Appeal

- 1) Write the Priority Appeal, from Part A in Column 1.
- 2) Think about how you might phrase this priority appeal, reviewing the two examples below.
- 3) Rephrase your Priority Appeal in at least three ways.
- 4) Agree/Vote which “sounds” the most unique and write it above in “Decision Made.”

| Priority Appeal | Phrasing for a Key Promise |
|-----------------------------------|--|
| | 1. |
| | 2. |
| | 3. |
| <i>Example: Respect</i> | 1. <i>Be respected</i> 2. <i>For the respect of your family</i> 3. <i>To be respected</i> |
| <i>Example: Children’s health</i> | 1. <i>For the health of your children</i> 2. <i>Healthy family</i> 3. <i>Your children’s health tomorrow</i> |



Decision Making Tool 5.2: Developing Promotion-Specific Objectives

Decision Made – Promotion-Specific Communication Objectives (Write on **Product 5: Promotion Plan, Part A. Creative Brief)**

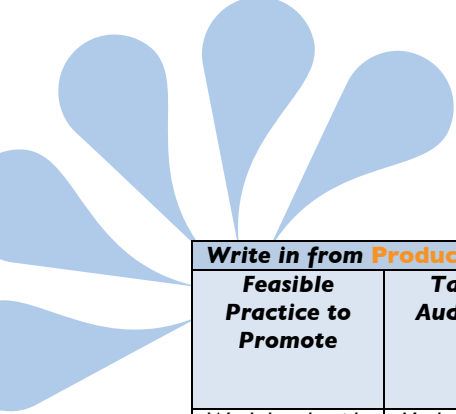
| | |
|----|-------|
| 1. | _____ |
| 2. | _____ |
| 3. | _____ |
| 4. | _____ |
| 5. | _____ |
| 6. | _____ |
| 7. | _____ |
| 8. | _____ |

Instructions for Use: Use **Product 5: Promotion Plan, Part A. Creative Brief:**

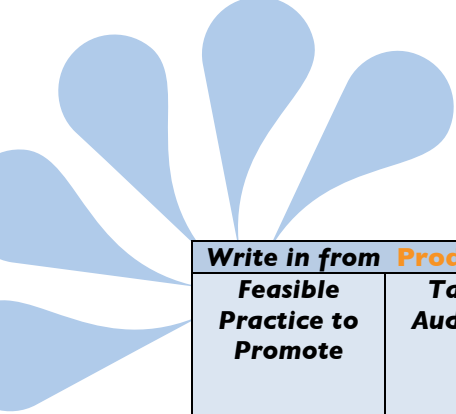
- 1) In Column 1, write in the feasible practice to promote.
- 2) In Column 2, write the primary audience.
- 3) In Column 3, write the stage on the continuum for this audience – is aware, knows, is encouraged, intends to try, has acted, has evaluated, or is reinforced (noted on **Product 3: Behavior Analysis**).
- 4) Using the sample on the next page and instructions on the table, develop up to eight promotion-specific objectives and write them in the “Decision Made” box above.

Promotion-specific objectives:

- ✓ Support the motivators
- ✓ Overcome/address the barriers
- ✓ Move the primary audience toward ACTION - Try



| Write in from Product 3: Behavior Analysis | | | Determine: | | | | |
|---|---|--|--|---|---|---|---|
| Feasible Practice to Promote | Target Audience | Stage | Specific What do you expect your audience to be aware of, to know, to be encouraged about, to intent to try, to try, to evaluate, and/or to reinforce? | Measurable How much of a change do you hope for in EACH "specific?" | Achievable How will you assess that the "measurable" was achieved? | Realistic What practical and sufficient way can you indicate that the "specific" is happening? | Timely By when do you hope to see this change? |
| Wash hands with soap after using the latrine | Mothers of children under 5 in 3 targeted rural areas | Is Aware NOW — Audience needs to: - Know - Be encouraged - Intend to try - TRY | KNOW: - How to wash hands - When to wash hands BE ENCOURAGED - Why important to wash hands after using latrine INTENT TO TRY - Wash hands after latrine use TRY - Wash hands after latrine use | Double, Triple Decrease Increase Reduce Cut BY: %/# | Primary Audience <u>will:</u> Cite Report State Answer Sign Name DO | Accurately At least two, three Twice Per day Weekly Reported Observed | By end of six months |
| <p>By the end of six months:</p> <p>Know:</p> <ol style="list-style-type: none"> Increase by 40% the number of mothers of children under five in targeted rural areas who accurately answer how to wash hands. Increase by 30% the number of mothers of children under five in targeted rural areas who can name at least two critical times to wash hands. <p>Be Encouraged:</p> <ol style="list-style-type: none"> Triple the number of mothers of children under five in targeted rural areas who can cite at least three accurate reasons why it is essential to wash hands with soap after using the latrine. <p>Intent to Try:</p> <ol style="list-style-type: none"> Double the number of mothers of children under five in targeted rural areas who state that they intend to wash their hands with soap after using the latrine at least twice per day <p>TRY [ACTION]: This ACTION promotion-specific objective corresponds directly to the "strategy objective" for the same timeframe:</p> <ol style="list-style-type: none"> Increase from a reported 20% to a consistently observed 45% of mothers of children under five in targeted rural areas washing their hands with soap after using the latrine by the end of Year 1 | | | | | | | |



| Write in from Product 3: Behavior Analysis | | | Determine: | | | | |
|---|------------------------|--------------|--|---|--|--|--|
| Feasible Practice to Promote | Target Audience | Stage | Specific What do you expect your audience to be aware of, to know, to be encouraged about, to intent to try, to try, to evaluate, and/or to reinforce? | Measurable How much of a change do you hope for in EACH "specific?" | Achievable How will you assess that the "measurable" was achieved? | Realistic What practical and sufficient way can you indicate that the "specific" is happening? | Timely By when do you hope to see this change? |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Formulated Objectives: | | | | | | | |

Decision Making Tool 5.3: Defining Tone of Promotion

Decision Made – Three Tones Selected (Write on **Product 5: Promotion Plan, Part A. Creative Brief**)

1. _____
2. _____
3. _____

Instructions for Use: Review the first three columns. Determine, based on the Behavior Analysis, primary audience and promotion-specific objectives as well as the detailed Key Promise and Message, which tone or combination of tones are most appropriate for the promotion program. Select up to three tones and write in the “Decision Made” box above.

Choose a **MAXIMUM of three** types of tone so that the messages can be clearly presented and understood.

| Types of Tone | Description | Check if this tone works best: |
|----------------------|--|---------------------------------------|
| Emotional | Attracts attention, elicits an emotional response | <input type="checkbox"/> |
| Rational | Convinces audience through facts | <input type="checkbox"/> |
| Positive | Suggests control, hope, and action | <input type="checkbox"/> |
| Mass | Is group appeal, everybody else is doing it | <input type="checkbox"/> |
| Individual | Appeals to one person and his/her uniqueness | <input type="checkbox"/> |
| Humorous | Helps attract favorable attention and increase recall | <input type="checkbox"/> |
| Serious | Communicates the grave nature of an issue | <input type="checkbox"/> |
| Direct Argument | Points to a certain conclusion by stating it frankly | <input type="checkbox"/> |
| Indirect Argument | Points to a certain conclusion without explicitly stating it | <input type="checkbox"/> |
| Repetitive Appeal | Repeats the message in many ways at many times. Increases the amount of information an audience can remember | <input type="checkbox"/> |
| One-Time Appeal | Holds a “day” or event to present the appeal once | <input type="checkbox"/> |
| One-Sided | Presents only one viewpoint on a case | <input type="checkbox"/> |
| Balanced | Presents both sides of a case and allows audience to make own decision | <input type="checkbox"/> |
| Didactic | Presents straightforward case | <input type="checkbox"/> |
| Discussion | Allows for presentation of arguments | <input type="checkbox"/> |
| Authoritative | Commands that an action be taken | <input type="checkbox"/> |
| Peer | Appeals to those with demographics in common | <input type="checkbox"/> |

Decision Making Tool 5.4: Choosing Appropriate Media Channels

Decision Made – Media Channels Selected for the Promotion (choose a maximum of FIVE) (Write on *Product 5: Promotion Plan, Part A. Creative Brief*)

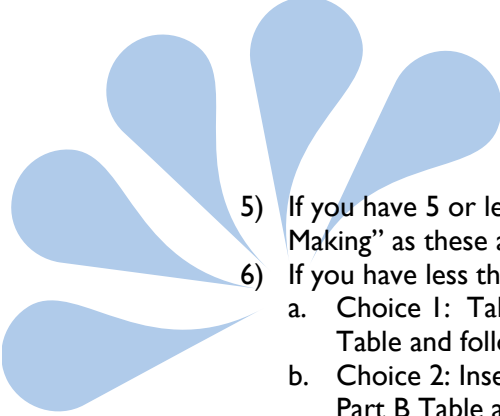
1. _____
2. _____
3. _____
4. _____
5. _____

PART A: Select Appropriate Channels

Instructions for Use: In the Media Channels by Approach Table on the next page, the Column 1 lists most types of media channels by type. The “Xs” indicate the channel best suited to each approach.

- 1) Circle in the TOP row, the three approaches noted on **Product 5: Promotion Plan, Part A. Creative Brief.**
- 2) Circle the channels that each approach has in common.
- 3) In Column 1, highlight the channels cited in the research “as preferred by the audience.”
- 4) Complete the Table below based on what you circled and highlighted in the Media Channels table.

| IDENTIFIED MEDIA CHANNELS FOR YOUR PROMOTION | | |
|--|--|---|
| Identified Under ALL 3 Approaches (or all 3 AND an Audience Preference) | Identified Under 2 Approaches AND as an Audience Preference | Identified Under 2 Approaches |
| Write all Media Channels circled under ALL 3 Approaches (or identified under ALL 3 approaches and as an audience preference) | Write All Media Channels circled under 2 approaches AND identified as an audience preference | Write All Media Channels circled under 2 approaches |
| | | |

- 
- 5) If you have 5 or less media channels listed in Column 1, stop and write them in the “Decision Making” as these are the best fit for your program.
 - 6) If you have less than 5 in Column 1 AND wish to have 5 media channels total:
 - a. Choice 1: Take the Media Channels from Column 2, insert into the top row of the Part B Table and follow the instructions.
 - b. Choice 2: Insert all Media Channels identified in Columns 2 and 3 into the top row of the Part B Table and follow the instructions.
 - 7) If you have more than 5 Media Channels listed in Column 1, insert all Media Channels identified in Column 1 into the top row of the Part B Table and follow the instructions.
 - 8) If you have no Media Channels listed in Column 1, insert all Media Channels identified in Columns 2 and 3 into the top row of the Part B Table and follow the instructions.

| MEDIA CHANNELS BY APPROACH (X indicates BEST FIT OF CHANNEL for Approach) | | | | | | |
|--|----------------------------------|--------------------------------------|-------------------------|-----------------|-----------------|---------------------|
| Circle YOUR Promotion Approaches ⇨ | Information and Education | Behavior Change Communication | Social Marketing | Training | Advocacy | Mobilization |
| Media Channels ⇩ | | | | | | |
| Non-Print | | | | | | |
| • TV programs | X | | X | | X | |
| • TV spots | | X | X | | | |
| • Video programs | X | | | X | | |
| • Radio programs | X | | X | | X | |
| • Radio spots | | X | X | | | X |
| • Road shows | X | | X | | | X |
| • Music CDs | | | | | | |
| Traditional | | | | | | |
| • Song | | | X | | | X |
| • Drama | | X | X | X | | X |
| • Dance | | | | | | X |
| • Puppetry | | X | | | | X |
| Interpersonal | | | | | | |
| • Role plays | | X | X | X | | |
| • Group discussions | X | X | X | X | X | |
| • Field Visits | X | | | | X | |
| • Talks | | | | X | X | |
| • Storytelling | | X | | | | X |
| • Home visits | | X | | X | | |
| • Fairs, “Days” | X | | | | | X |
| • Community-led activity | | X | | | | X |
| • Meetings | X | | | | X | |
| • Participatory transformation | | X | X | | | X |
| • Demonstrations | | X | | X | | |
| Print | | | | | | |
| • Posters | X | X | X | | | |
| • Flipcharts | | X | | X | | |
| • Brochure, leaflet, booklets | X | X | X | | X | |
| • Newspapers, magazines | | | | | X | |

MEDIA CHANNELS BY APPROACH (X indicates BEST FIT OF CHANNEL for Approach)

| Circle YOUR Promotion Approaches ⇨ | Information and Education | Behavior Change Communication | Social Marketing | Training | Advocacy | Mobilization |
|---|----------------------------------|--------------------------------------|-------------------------|-----------------|-----------------|---------------------|
| Media Channels ↓ | | | | | | |
| • Billboards, Banners | X | | | | X | |
| • Internet/website | X | | | X | X | |
| • Graphic novels, Comic books | X | X | | | | |
| • Flash cards | X | | | X | | |
| • Games | X | | | X | | X |
| • Danglers | | X | X | | | |
| • Text messaging | X | | X | | | |
| • Manuals, guides | X | | | X | | |
| • Clothing | X | | X | | | X |
| • Photo-journal | X | | | | X | |
| • Wall paintings | X | | | | | |
| • Give aways | | | X | | | X |

PART B: Reduce Number of Media Channels to Five Maximum

Instructions for Use: ONLY USE PART B as instructed in #6), #7), or #8) of Part A.

- 1) Write in Media Channels on Row I as identified in #6), #7) or #8) of Part A.
- 2) Rate the quality (Column I) of each Media Channel based on your knowledge, experience and, when applicable, research (1 low – 10 high, see more scale information below):

| SCALE |
|-----------------------------|
| 1 – No/Not at All/Poor |
| 10 –Yes/Very much/Excellent |

- 3) Total the score for each channel at the bottom.
- 4) Select the **highest scores** of the Media Channels for the number of Media Channels you need to have your FIVE total.
- 5) Write above in “Decision Made” above.

| Channel ⇨ | | | | | | Example | | | |
|--|--|--|--|--|--|---------|---------------|------------|-------|
| | | | | | | Poster | Group Meeting | Radio Spot | Games |
| Quality ⇩ | | | | | | | | | |
| Reach (Can many people be reached with this channel?) | | | | | | 5 | 6 | 10 | 2 |
| Appropriateness (Is this channel appropriate for the key message?) | | | | | | 9 | 8 | 6 | 2 |
| Frequency (Can this channel convey the key message often?) | | | | | | 4 | 4 | 10 | 1 |
| Credibility (Is this channel credible with the primary audience?) | | | | | | 8 | 9 | 7 | 1 |
| Relative Cost (Is the cost per person for this channel low?) | | | | | | 5 | 8 | 8 | 2 |
| Human Resources (Is there little Human Resource required to develop, produce, distribute, perform this channel?) | | | | | | 7 | 2 | 3 | 2 |
| Financial Resources (Is there minimal financial resources required to develop, produce, distribute, air, perform this channel?) | | | | | | 2 | 10 | 2 | 2 |
| TOTAL SCORE | | | | | | 40 | 47 | 46 | 12 |



Decision Making Tool 6.1: Designing a Storyboard

Instructions for Use: Use **Product 5: Promotion Plan, Part A. Creative Brief** as the guide to developing a storyboard. Prepare one storyboard per piece of material and/or activity to be developed. Compare the storyboard regularly to ensure that it is consistent with the Creative Brief. See example on page 2 of this Decision Making Tool for a sample, completed storyboard.

Decision Made – Media Channel Designed Storyboard

| STORYBOARD – Key Promise and Feasible Practice (Message) | | | |
|--|---------------------------|----------------------------------|---------------------------|
| Subject: | | Date: | |
| Target Audience: | | Size/No. of Pages/Length: | |
| Media Channel: | | Developers: | |
| Location: | Location: | Location: | Location: |
| Visual Description | Visual Description | Visual Description | Visual Description |
| Basic Content | Basic Content | Basic Content | Basic Content |
| Location: | Location: | Location: | Location: |
| Visual Description | Visual Description | Visual Description | Visual Description |
| Basic Content | Basic Content | Basic Content | Basic Content |

SAMPLE BROCHURE STORYBOARD

| STORYBOARD – “LIFE IS SIMPLE, LIFE IS GOOD” SAFELY DRINK YOUR WATER STRAIGHT FROM THE TAP | | |
|--|--|--|
| Subject: Reduce the Boiling of Safe, Piped Water | | Date: 7 October 2010 |
| Target Audience: Mothers in female-headed households | | Size/No. of Pages/Length: A4, 3-fold, double-sided |
| Media Channel: 3-fold Brochure | | Developers: Mr. M and Mrs. L |
| Location: Side 1, Fold 1 | Location: Side 1, Fold 2 | Location: Side 1, Fold 3 |
| Visual Description 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 drinking from it; all are smiling, clean dressed | Visual Description Shows various types of taps that people could have from this water service provider | Visual Description Shows one man (from agency that assure water quality) inspecting and testing the water, with another woman (maybe same mother from Side 1, Fold 1) giving two thumbs up for “quality” |
| Basic Content Assure female customers, give facts on the safety of drinking water from the tap | Basic Content Continue to give facts on safety and discuss all types of piped water that are safe to drink Key promise and message | Basic Content Give information on how, when and why water is tested and the results, assure customers that it is tested by trained professionals |
| Location: Side 2, Fold 1 | Location: Side 2, Fold 2 – BACK Flap when folded | Location: Side 2, Fold 4 – FRONT Flap when folded |
| Visual Description Shows representative of water service provision walking through the village and waving at members of households, maybe kicking football to small children | Visual Description Water service provision representative with mother, son and daughter all enjoying a glass of water together. Logos at bottom in 1 cm circles | Visual Description 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 |
| Basic Content 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. | Basic Content Assure them that they can drink tap water safely | Basic Content Key promise and message only [in CAPS or as designed] |



Decision Making Tool 6.2: Texting/Scripting the Materials and Activities

Instructions for Use: Use **Product 5: Promotion Plan, Part A. Creative Brief** and your completed storyboard from **Decision Making Tool 6.1: Designing a Storyboard** to guide texting/scripting. Prepare one text/script table per piece of material and/or activity to be developed. Compare it regularly to your Creative Brief and the corresponding storyboard to ensure that they are consistent. See example on page 2 of this Decision Making Tool for a sample, completed texting/scripting table.

Decision Made – Each Channel Texted or Scripted

| Key Promise and Feasible Practice/Message: | | |
|---|--|---|
| Type and Subject of Material: | | |
| Basic Content Write in the “Basic Content” from the Storyboard developed for this material (Decision Making Tool 6.1: Designing a Storyboard) | Barriers or Motivators to Address in the Text/Script Write in the priority barriers and motivators from Product 5: Promotion Plan, Part A. Creative Brief | Text/Script Wording The ACTUAL text for the material or activity Develop clear, simple, straightforward text that responds to the basic content and addresses the barriers and/or to reinforce the motivators. Ask: – What must be conveyed to enable or encourage the primary audience to adopt the feasible practice (your Key Message)? – How might this be simplified? Focused? |
| | Barriers [to overcome in text]: | |
| | | |
| | | |
| | Motivators [to reinforce in text]: | |
| | | |
| | | |

SAMPLE BROCHURE TEXT

| | | |
|--|---|--|
| <p>Key Promise and Message: “LIFE IS SIMPLE, LIFE IS GOOD” SAFELY DRINK YOUR WATER STRAIGHT FROM THE TAP</p> | | |
| <p>Type and Subject of Material: 3-fold BROCHURE - Reduce the Boiling of Safe, Piped Water</p> | | |
| <p>Basic Content Write in the “Basic Content” from the Storyboard developed for this material (Decision Making Tool 6.1: Designing a Storyboard)</p> | <p>Barriers or Motivators to Address in the Text/Script Write in the priority barriers and motivators from Product 5: Promotion Plan, Part A. Creative Brief</p> | <p>Text/Script Wording The ACTUAL text for the material or activity Develop clear, simple, straightforward text that responds to the basic content and addresses the barriers and/or to reinforce the motivators.</p> |
| <p><i>Assure female customers, give facts on the safety of drinking water from the tap</i></p> | <p>Barriers: <i>Uncomfortable with drinking water directly from the taps</i> <i>Disbelief that water is actually safe</i> <i>Lack of knowledge and skills on how testing works</i></p> | <p><i>Be at ease (rest assured)</i> <i>Safely drink your water directly from the tap</i></p> |
| <p><i>Continue to give facts on safety and discuss all types of piped water that are safe to drink</i></p> | <p>Motivators: <i>Feels their duty to protect their children from disease any way they can</i> <i>Willingness to learn and have water tested</i> <i>Belief that water utility does care about them and their community</i></p> | <p><i>All of our piped water, whatever the type of tap or connection, is safe to drink.</i></p> |
| <p><i>Give information on how, when and why water is tested and the results; assure customers that it is tested by trained professionals</i></p> | <p>Motivators: <i>Feels their duty to protect their children from disease any way they can</i> <i>Willingness to learn and have water tested</i> <i>Belief that water utility does care about them and their community</i></p> | <p><i>Our water is tested regularly and always receives a two thumbs up from (source of quality assurance). And even more importantly, always receives a two thumbs up from our most important inspectors – YOU!</i></p> |
| <p><i>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</i></p> | <p>Motivators: <i>Feels their duty to protect their children from disease any way they can</i> <i>Willingness to learn and have water tested</i> <i>Belief that water utility does care about them and their community</i></p> | <p><i>We at (name of service provider) are looking out for your well-being and health.</i> <i>We test and assure that the water you receive from our piped water and your tap is safe to drink.</i> <i>Be at ease and drink your water safely – directly from the tap.</i></p> |

Decision Making Tool 7.2: Recording Individual Pretests

Instructions: Use one sheet per photo/ illustration/page with its corresponding text. Write responses per participant on ONE row. You can record 3 participants per page. See Sample on next page.

| Participant | Picture #: _____ Describe Picture: | Write Text: | PRETEST FORM – Pretest Round: _____ | | | | | | |
|-------------|---------------------------------------|--------------------------------|-------------------------------------|-----------------------------------|--|-------------|---|----------|---|
| | What do you see? | What do the words mean to you? | Topic: Facilitator: Date: | Note Taker: Language: | | Picture-OK? | | Text-OK? | |
| | | | ATTITUDES How do you like it? | CHANGES What would you change? | | 😊 | ☹ | 😊 | ☹ |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

SAMPLE RECORDED INDIVIDUAL PRETEST RESPONSE

| | | | | | | | | |
|--------------------|--|--|--|---|--------------------------------|---|-----------------|---|
| Participant | Picture #: <u>A</u> | Write Text: <i>Comfort flows, connect</i> | PRETEST FORM – Pretest Round: <u>1</u> | | | | | |
| | Describe Picture: <i>Tap with water flowing freely</i> | | Topic: <i>Water Connections</i> | | Note Taker: <i>Jane</i> | | | |
| | | | Facilitator: <i>Mary</i> | | Language: <i>Bahasa</i> | | | |
| | What do you see? | What do the words mean to you? | ATTITUDES | CHANGES | Picture-OK? | | Text-OK? | |
| | | | How do you like it? | What would you change? | ☺ | ☹ | ☺ | ☹ |
| <i>1</i> | <i>A tap, water going everywhere, water wasted</i> | <i>Makes me comfortable, if I am wet, if water pours</i> | <i>No, wasting water, “how can I be comfortable, if I am wet?”</i> | <i>Have water going into a sink, woman with her hands in it washing her face or her hands</i> | | X | | X |



Decision Making Tool 7.3: Recording Group Pretests

Information to Note at the Top of Each and Every Group Pretest Page:

- Pretest Round:
- Date:
- Type of Material:
- Topic:
- Facilitator:
- Note Taker:
- Language:
- *Picture #: (if appropriate)*
- *Describe Picture: (if appropriate)*
- *Write Text: (if appropriate)*

Information to Record for Group Pretests on Illustrations/Pictures and to Text/Script/Content :

- Changes
- Likes/Dislikes (estimate “numbers” with most, many, few)
- Recommendations
- Confusions

Instructions:

- 1) Be sure to label each and every page of the note pad with the information listed above so that pages can be kept together easily and, if mixed up, can be easily put back into proper sets.
- 2) Page number consecutively as you use pages – 1, 2, 3, 4, etc.
- 3) Have the Pretest Topic Guide in front of you for taking notes so that you can follow along and write the question in as it is asked.
- 4) Summarize or paraphrase comments. Avoid taking “verbatim” notes as it is very difficult to read through later and to keep up with comments.
- 5) Estimate “numbers” with most, many, few, etc. Don’t count responses or total the number of times someone says something. These pretests are qualitative and as such require that you get an idea of what is being said.
- 6) Review Analysis Tool to be sure you note the information needed to make changes – changes suggested, words with which people had difficulties, things people did not like, etc.

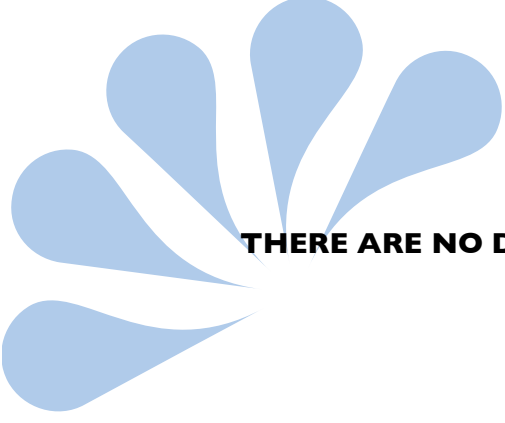
Decision Making Tool 7.4: Analyzing and Revising Materials

Instructions: Use the following form to calculate whether the Photo, Text, Scene, or Piece was successful and if not, how it should be changed for the next round of pretesting. 1) Tabulate total possible responses of participants in numbers and percentages. 2) Compare the results with established criteria for success-**80%**. 3) Look for changes many/most participants commented on/suggested. 4) Compare results with original message/illustration intent. 5) Decide whether to (a) keep it “AS IS” or (b) recommend changes and what changes to make. See Sample on next page.

| PRETEST ROUND: _____ | | Dates: From _____ to _____ | | | | | | | |
|---------------------------------|--|---|---|-----------|---|--|-----------------------------|--------------------------|-----------------|
| Facilitator: _____ | | Note Taker: _____ | | | | | | | |
| Topic: _____ | | Language: _____ | | | | | | | |
| ANALYSIS SECTION | | | | | | REVISION SECTION | | | |
| Number of Piece, Picture, Scene | Total Participants (and Total Groups if groups used) | Calculate whether Participants found the Picture/Text, Scene, Clip was SUCCESSFUL [80% “like” is considered success] | | | | CHECK ✓ If MUST be improved | Issues to Clarify or Change | Specific Changes to Make | |
| | | ☺ Like | | ☹ Dislike | | | | to Picture/Image: | to Text/Script: |
| | | # | % | # | % | | | | |
| | | | | | | | | | |
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SAMPLE ANALYSIS AND REVISION TO MATERIALS – BASED ON PRETEST RESULTS

| PRETEST ROUND: <u> 2 </u> | | Dates: From <u> March 4 </u> to <u> March 7, 2011 </u> | | | | | | | |
|---------------------------------|--|---|-----|-----------|-----|--|---|---|-------------------------------------|
| Facilitator: <u> Ben </u> | | Note Taker: <u> John </u> | | | | | | | |
| Topic: <u> Water Supply </u> | | Language: <u> Tagalog </u> | | | | | | | |
| ANALYSIS SECTION | | | | | | REVISION SECTION | | | |
| Number of Piece, Picture, Scene | Total Participants (and Total Groups if groups used) | Calculate whether Participants found the Picture/Text, Scene, Clip was SUCCESSFUL [80% “like” is considered success] | | | | CHECK ✓ If MUST be improved | Issues to Clarify or Change | Specific Changes to Make | |
| | | ☺ Like | | ☹ Dislike | | | | to Picture/Image: | to Text/Script: |
| | | # | % | # | % | | | | |
| A1 | 30 (3 groups) | 10 | 33% | 20 | 67% | ✓ | “water supply” unclear, illustration unclear, colors too shocking | Replace illustration with actual photo of water supply to depict Mute colors – dull red, soft blue and green | Change water supply to water source |
| A2 | 30 (3 groups) | 25 | 84% | 5 | 16% | OK | KEEP “AS IS” | KEEP “AS IS” | KEEP “AS IS” |



THERE ARE NO DECISION MAKING TOOLS FOR STEP 8.



Decision Making Tool 9.1: Developing Outcome and Process Indicators

Decisions Made – Outcome, and Process Indicators of Success (10-15 TOTAL maximum) (Write on **Product 9: Monitoring and Evaluation Plan**)

Number Outcomes indicators consecutively, for example 1, 2, 3; then continue numbering with the Process indicators:

Part A: Outcome Indicators:

Part B: Process Indicators:

Part A: Develop Outcome Indicators

Instructions for Use:

- 1) All outcome indicators should directly reflect promotion-specific objectives. Write promotion-specifics on Column 1, one objective per row using **Product 5: Promotion Plan, Part A: Creative Brief**.
- 2) Develop up to 5-10 outcome indicators. Remember that you still need to develop process indicators in Part B and that you should not have more than 15 TOTAL indicators (outcome and process indicators). The more indicators you have, the more you must monitor and evaluate.
- 3) Define any indicator terms that need to be clarified so that it can be accurately measured and assessed.
- 4) Write ONLY the “SUCCESS Indicator” above in the “Decision Made” box.
- 5) Review sample outcome indicators on next page before developing your own.

SAMPLE OUTCOME INDICATORS

| Promotion-Specific Objectives Developed | BEFORE Promotion Research | Number Specifics | SUCCESS OUTCOME Indicator |
|---|---|---|---|
| Write objectives from Product 5: Promotion Plan, Part A: Creative Brief | Write down relevant findings from research | Determine the REALISTIC percentage or number change | Word as a success indicator |
| Example: After one year: | BEFORE Promotion, our research indicated that: | AFTER Promotion, we want to see: | We will know we achieve SUCCESS by seeing that: |
| Increase percentage of mothers of children under five in targeted rural areas who accurately answer how to wash hands. | 25% said with clean water and soap 65% said with clean water only | At least 65% | 1. 65% of mothers cite with clean water and soap as proper way to wash hands |
| Increase percentage of mothers of children under five in targeted rural areas who can name at least two critical times to wash hands. | 35% said before eating 55% said after using the toilet 25% said before preparing food 38% said before breastfeeding | At least 65% At least 85% | 2. 65% of mothers cite before eating as a critical handwashing time 3. 85% of mothers cite after using the toilet as a critical handwashing time |
| Triple the number of mothers of children under five in targeted areas who can cite at least two reasons why it is essential to wash hands with soap after using the latrine. | 46 said reduces diarrhea 62 said keeps children healthy No other benefit cited | At least 138 At least 196 | 4. 200 mothers cite any 2 of the following as reasons to wash hands with soap after using the toilet: (1) reduced diarrhea, (2) healthy children, or (3) reduced medical expenses |
| Double the number of mothers of children under five in targeted rural areas who state that they intend to wash their hands with soap after using the latrine at least twice per day | 39 said that they had soap for handwashing 49 stated that they wash with soap after latrine twice a day 68 stated that they wash with soap after latrine once a day | At least 50 At least 98 At least 98 | 5. 100 mothers state that they plan to wash their hands with soap after using the toilet at least twice a day |



| Promotion-Specific Objectives Developed | BEFORE Promotion Research | Number Specifics | SUCCESS OUTCOME Indicator |
|--|---|---|--|
| Write objectives from Product 5: Promotion Plan, Part A: Creative Brief | Write down relevant findings from research | Determine the REALISTIC percentage or number change | Word as a success indicator |
| By _____: | BEFORE Promotion, our research indicated that: | AFTER Promotion, we want to see: | We will know we achieve SUCCESS by seeing that: |
| | | | |
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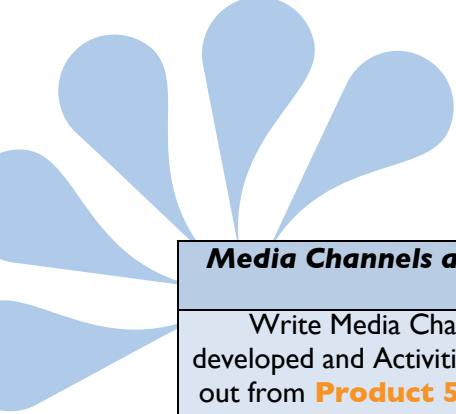
Part B: Develop Process Indicators

Instructions for Use:

- 1) All process indicators should directly reflect media channels to be used and activities to be carried out. Write specifics on Column I, one per row using **Product 5: Promotion Plan, Part A: Creative Brief** and **Parts B-E**, as selected for your promotion.
- 2) Develop up to 5-10 process indicators. You developed outcome indicators in Part A so that you know how many indicators you can still develop to have your maximum of 15 TOTAL.
- 3) Write ONLY the “SUCCESS Indicator” above in the “Decision Made” box.
- 4) Review sample process indicators on table below before developing your own.

SAMPLE PROCESS INDICATORS

| Media Channels and Activities | Media Channel and Activity Description | Planned Specifics | SUCCESS PROCESS Indicator |
|---|--|---|--|
| Write Media Channels to be developed and Activities to be carried out from Product 5: Promotion Plan, Part A: Creative Brief and Parts B-E , as selected for your promotion | Provide further description if needed to develop a clear process indicator (as detailed and thought through in Product 5: Promotion Plan, Part A: Creative Brief and Parts B-E , as selected for your promotion | Write in PLANNED number | Write a success indicator |
| <ul style="list-style-type: none"> - 1 drama - 1, 8-page flipchart - 2 group discussion guides and answer sheets - 5 training session types | <ul style="list-style-type: none"> • Drama will be used with mothers in group discussions • Flipchart will be used by secondary audience to train mothers • Group discussions will be held with 2 different audiences – mothers and fathers • 5 different types of training sessions will be conducted – all to improve savings ability of mothers | <ul style="list-style-type: none"> ✓ Drama -1 per month for 1 year ✓ Flipchart – 1 for each of 10 trainers ✓ Group Discussions – 1 per month for fathers, 2 per month for mothers with maximum 20 participants ✓ Training sessions – 20 groups of mothers, 10 per group | <ol style="list-style-type: none"> 1. 12 dramas performed 2. 10 flipcharts distributed 3. 38 group discussions held 4. 300 mothers participated in group discussions 5. 200 fathers participated in group discussions 6. 200 mothers trained in savings techniques |



| Media Channels and Activities | Media Channel and Activity Description | Planned Specifics | SUCCESS PROCESS Indicator |
|---|---|--------------------------|----------------------------------|
| Write Media Channels to be developed and Activities to be carried out from Product 5: Promotion Plan, Part A: Creative Brief and Parts B-E , as selected for your promotion | Provide further description if needed to develop a clear process indicator (as detailed and thought through in Product 5: Promotion Plan, Part A: Creative Brief and Parts B-E , as selected for your promotion | Write in PLANNED number | Write a success indicator |
| | | | |
| | | | |
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| | | | |

Decision Making Tool 9.2: Selecting Methods for Monitoring and Evaluating

Decision Made – Monitoring and Evaluation Methods to Use: (Write on Product 9: Monitoring and Evaluation Plan)

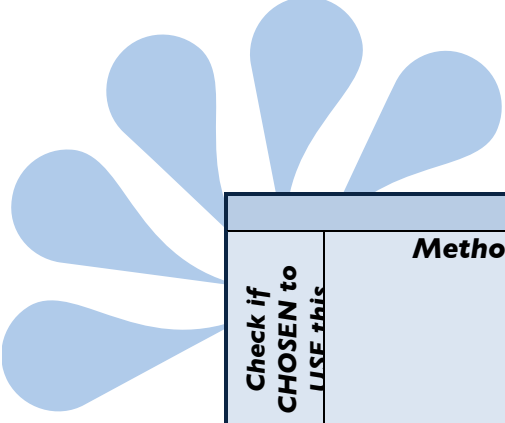
Monitoring Methods to Use:

Evaluation Methods to Use:

Instructions for Use:

When possible, use the research methods that were used for the promotion design and information gathering in Step 2 for Evaluation. Just as was done in selecting methods for the design research, review each method of information gathering. Select two to three methods that best match your promotion monitoring and evaluation needs. You must have a combination of both quantitative and qualitative methods. Write your three choices for monitoring and three choices for evaluation in the “Decision Made” box above.

| Information Gathering Methodologies | | | | |
|--|-----------------------------------|---|---|---|
| Check if CHOSEN to USE this | Methods | BEST Used for: | What is Does | Indicate Whether to Use this CHOSEN method for Monitor OR Evaluation |
| <input type="checkbox"/> | 1. Survey | Monitoring Evaluation | - Asks a series of questions to determine awareness, attitudes, knowledge, and reported practices | |
| <input type="checkbox"/> | 2. Questionnaire | | | |
| <input type="checkbox"/> | 3. Recall Survey | Monitoring | - Works best on a single issue - Uses close-ended questions, scaled responses, and multiple choice - Gathers the “whether,” “what,” and “how much/many” | |
| <input type="checkbox"/> | 4. Direct or Indirect Observation | Monitoring Evaluation Supervision | - Looks - Records - Analyzes behavior and actions | |
| <input type="checkbox"/> | 5. Site Observation | | | |
| <input type="checkbox"/> | 6. Training Observations | | | |
| <input type="checkbox"/> | 7. Records Audit | Monitoring | - Examines existing documents or items in a systematic manner - Uses a checklist to indicate Yes or No only | |
| <input type="checkbox"/> | 8. Site Audit | | | |
| <input type="checkbox"/> | 9. Materials or Supplies Audit | | | |
| <input type="checkbox"/> | 10. Exit or Intercept Interview | Monitoring Evaluation Supervision | - Discusses around a specific topic - Can be structured or unstructured | |
| <input type="checkbox"/> | 11. Individual Interview | Evaluation | - Discusses around a specific topic | |



| Information Gathering Methodologies | | | | |
|--|---|-----------------------|--|---|
| Check if CHOSEN to USE this | Methods | BEST Used for: | What is Does | Indicate Whether to Use this CHOSEN method for Monitor OR Evaluation |
| | | | <ul style="list-style-type: none"> - Gathers personal, sensitive information and behavioral data - Gathers the “what” and “why” | |
| <input type="checkbox"/> | 12. Focus Group Discussion | Evaluation | <ul style="list-style-type: none"> - Uses “topic guide” only - Gathers behavioral data - Gathers the “what” and “why” - Encourages social, group interaction and ideas - Can be used to focus individual interviews and surveys | |
| <input type="checkbox"/> | 13. Listening Group | Monitoring | <ul style="list-style-type: none"> - Gathers knowledge, awareness, message recall - Uses simple structured form | |
| <input type="checkbox"/> | 14. Form: exposure, broadcast, delivery | Monitoring | <ul style="list-style-type: none"> - Uses a simply tally system - Uses pre-established issues, areas to examine | |



THERE ARE NO DECISION MAKING TOOLS FOR STEP 10.