

**Module 3**  
**The Social Marketing Process**

**By**

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*Social marketing*

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Module 3  
the SOCIAL MARKETING PROCESS

Draft for Discussion  
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## I. Introduction

The Social Marketing process involves a set of highly interrelated, sometimes continuous and overlapping, steps and activities that together help bring about a successful program. Often this success is measured by the degree to which a social marketing program ~~is~~ <sup>is</sup> ~~research-based~~ <sup>still</sup> and attuned to specific audience needs and resource capabilities. This implies the need for careful <sup>research,</sup> ~~planning~~ and organization.

As presented in the module, the stages in the process follow a logical sequence: from pre-planning, to planning, implementation, ~~implem~~entation, then evaluation. Each of the stages requires an adequate understanding of basic communication principles, marketing techniques, and social research methodology.

Any program requires consideration of its main elements systematically, and often, simultaneously in order for it to be considered effective. This module is an attempt to guide planners, implementors and researchers through the whole gamut of program development & designing, execution and control, as well as monitoring and evaluation. The tasks involved are gigantic, and the magnitude enormous, especially at the planning stage. However, as in all other action programs, a well thought out and realistic plan often suggests that more than half the work has been accomplished. In this sense, this module becomes a friendly guide for any social marketer

## II. Objectives of this Module

After going through this module, the learner should be able to:

- \* identify the different stages in the social marketing process;
- \* describe the activities involved at every stage of the social marketing process;
- \* ~~acquire~~ <sup>demonstrate</sup> skills needed to design, implement, and evaluate a social marketing program;
- \* develop a specific social marketing program

### III. Units of this Module

This module consists of four (4) units that correspond to the stages of the social marketing process, namely: 1) pre-planning 2) planning, 3) implementation; and 4) evaluation.

#### UNIT I. PRE-PLANNING STAGE

This unit serves as basis for any social marketing program. It provides planners with baseline data that help set the direction and goals of the program. Specifically, this stage includes such essential activities as needs assessment, problem definition, identification of target audiences and communication networks, and resource inventory.

#### A. Key Concepts & their definition:

Key Concepts: Needs assessment, problem definition identification of target audience, communication network, resource inventory

##### 1. Needs Assessment

This refers to the process of identifying the felt-and-not-just-the-perceived-needs of the target community for the purpose of determining the best approach <sup>to social</sup> ~~of marketing~~ <sup>to social</sup> ~~the social development program.~~

This is premised on the assumption that social marketing can only be effective if it is perceived to offer a product the people feel they need. As a first step in the pre-planning stage, the importance of this process in ensuring the success of the social marketing program therefore cannot be ~~underseered~~, for it bears upon all the other components ~~underestimated~~

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of social marketing, particularly on the identification of the best communication strategy.

#### Methodology:

In assessing the needs of the target community, one must distinguish between perceived and ~~actual~~ <sup>felt</sup> needs. Perceived needs are those identified for the people by an outside agent, e.g., by a planner, while felt needs are those identified by the people themselves. While these two may coincide in some instances, in many others, they do not and hence the need to make the distinction.

The same distinction must be made between needs and wants. It is noteworthy to point out that in most, if not in all cases, social marketing has to do with converting needs into wants. Felt needs may be social, cultural, psychological or economic in nature and data on these may be generated from any or all the activities specified toward the end of the unit. Having identified the needs the next step is to prioritize these to see which ones can be effectively addressed by the development program. It is these prioritized needs that can then be highlighted in designing the social marketing program.

#### 2. Problem Identification

This refers to the process of defining the potential resistance and acceptance points given the assessed needs of the community. Again, this is crucial in determining the total social marketing strategy in so far as it provides information as to the best entry point for the

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program as well as give the planners the opportunity to anticipate the difficulties that must be overcome. It also enables planners to decide on the possible focus of the marketing effort given the range of needs identified under assessment.

### Methodology

Given the list of priority needs identified, decide which of these, aside from the specific need being targeted, is directly relevant to the particular development program being marketed. These needs constitute the possible acceptance points which can later be maximized in designing the social marketing program. Next, identify those needs which are not only peripherally addressed by the development program but actually pose conflicting or even contradictory demands to the development program, e.g., the felt need of mothers to help in augmenting the family income by working vis-a-vis a breast feeding campaign. Such needs can be labelled as the potential resistance points which can later be considered in planning the design of the social marketing program.

### 3. Identification of Target Audience

This refers to the process of identifying the intended receptors or beneficiaries of the social marketing product. It involves a comprehensive description of the socio-cultural characteristics of the target audience as well as a thorough analysis and understanding of

the level of the people's awareness-knowledge-attitude-practice (AKAP). A proper identification of the target audience is an important factor not only in determining the projected market share but also in designing an effective receptor-oriented marketing strategy.

Methodology:

Most of the data needed in this step can be generated from the application of research methods, both qualitative and quantitative. To obtain the AKAP level of the target group, focus groups, unstructured interviews and other qualitative techniques may be used.

4. Identification of Communication Network

This refers to the process of determining the natural built-in channels of communication whereby information is disseminated to community members. Specifically, it has to do with the network of informal kinship and non-kinship relationships which serve as conduits for the transference of knowledge, beliefs, and attitudes. This is an important resource to the project planning because it provides a cost-free and readily available mechanism by which information can be disseminated and as such, can be tapped in designing the project/campaign strategy.

### Methodology:

Communication networks can be identified by checking on the socio-cultural data on the nature of the target audience generated from the unit research activities. The questions most helpful at this point may be: Who are the influentials, opinion leaders, and decision-makers among the target audience? Who do people go to get information on.....? What are the existing formal and informal organizations in the community? What is the structure of social kinship organization of the community?

#### 5. Resource Inventory:

This refers to a survey of all available resources for the purpose of determining project costs as well as financial and other constraints. Included in such an inventory are cost estimates for project staff, consultants, logistics support, market resource, media time and materials development. Also included are built-in resources in the community such as local manpower, community networks and physical facilities. In certain instances, the budgetary allotment has been fixed beforehand and as such dictates the limitations within which planners must work. However, the planners must be creative enough to be able to tap other alternative sources.

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Methodology:

An initial resource inventory would entail a listing of all resources available in the planning office or agency *wf.c.n* be useful in undertaking the project, e.g., project staff, consultants, logistic support, etc... In the case of identifying the local resources available in the community, the following questions may be asked possibly in field survey: Does the community where the project takes place have access to appropriate local technical expertise? Are radio, television, and print media government owned (and thus potentially available free or at reduced cost)? Will the project have access to essential support services such as office supplies, copying facilities, vehicles, and gasoline? Are there traditional forms of media that can be tapped in product packaging, etc.?

Activity I - Ocular Inspection

Initially an ocular inspection may be undertaken to get acquainted with the geographical and physical conditions of the target area. This will also help determine other factors important in planning a program such as accessibility and resource availability.

Field Instruction: Visit the site and observe:

- a) means of transportation (accessibility)
- b) climate
- c) terrain
- d) water supply and other health facilities
- e) types of houses/buildings
- f) other relevant data

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### Activity II - Secondary Data Analysis

Vital demographic information may be obtained through existing census and other archival data readily available in different government centers, e.g., municipal hall/libraries, NID, Bureau of Census and Statistics, and population centers. A lot of effort may be saved by checking out these information centers first before conducting other researches. Data to be gathered in this activity may include size number of population, land area, socio-economic profile and historical background.

### Activity III - Field Survey

Field Instruction: Go back to the site. Make a random house-to-house sampling. Conduct informal interviews and draw up household profiles that will yield data relevant to the particular social marketing program you are planning to set up. Also try as much as possible to get data on levels of AKAP on certain issues.

### Activity IV - Focus Group

Focus group interview is a qualitative research technique which makes use of an informal group setting to elicit spontaneous information not otherwise given in structured individual interviews. A good focus group size ranges from 8-12 members. Be sure to choose members who are comfortable with each other and are able to give original spontaneous responses. As moderator, try to create relaxed atmosphere

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where members of the group can share freely and without inhibitions. Your task as facilitator is to "understand" the issues being researched, and help structure the interview to meet those ends by stimulating the discussion, drawing the respondents into the discussion, encouraging positive group interaction, controlling negative interaction and keeping the discussion "on track." Once the interview has been completed, the moderator must be able to interpret the responses and observations obtained from the session and interpret them to those who are conducting the research.

Activity V - Out of the data gathered from activities 1-4, go through each of the steps in the pre-planning stage and come up with your own output on needs assessment, problem definition, identification of target audience and communication network and resource inventory.

Learner's Evaluation

1. Why is it important to identify the felt needs of the target community before planning out the social marketing strategy?
2. What may happen if SM planners consider only perceived needs and fail to take into account the felt needs of the people?
3. What is the advantage of converting needs into wants "to SM"?
4. In what way is problem identification important in planning?
5. How does problem identification differ from needs assessment?
6. What is the role of target audience identification in the total SM strategy?
7. What kind of information or data is needed to be able to identify the target audience?
8. In your own words, state the meaning of "communication network."
9. What is the importance of identifying the communication networks in the target community?
10. What are included in resource inventory?
11. How does a resource inventory help in planning an SM program?

## Unit II - Planning Stage

This unit makes use of data generated -- of the pre-planning stage to design a concrete program of action to promote the identified social development goal. It is at this stage that the planner defines the parameters of his task in terms of what he has to attain, who he will address, how he will operate and for how long, and how he will assess his performance.

Specifically, this stage includes:

1. Objective Setting
2. Audience Symmentation
3. Product Definition
4. Project/Campaign Designing
  - a. Message formulation
  - b. Media Mixing
  - c. Conceptualizing/designing/Pre-testing of Campaign Materials
  - d. Drawing Up the Distribution/Media Placement Scheme
  - e. Training of Change Agents
  - f. Establishing Networks/Linkages
5. Designing the Monitoring and Evaluation Scheme
6. Determining Resource Requirements/Allocation
7. Scheduling/Time Frame

A careful consideration of each step will help ensure the success of the social marketing program.

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## Key Concepts and Their Definitions

### 1. Objective Setting

This defines the specific output expected upon the completion of a program. Specifically, it identifies the kind of behavior change that is aimed at in a developmental intervention. The planner has to set his objectives in consultation with the target community. This means that the community members should understand and accept the need for change and are willing to work to bring about the change. This can happen if the community members realize that the expected change is for their own interest and not simply something imposed on them by an outside entity. The planner must realize that he cannot introduce all desirable interventions in his community. The problems that are "readily amenable to intervention are those which can be understood and acted upon by the target population within its cultural frame of reference and within the limits of the resources that they can mobilize for change." From the very start, therefore, the social marketing program is oriented towards what the target population needs, understands, accepts, and can do something about. The objectives should reflect these considerations. Since the objective is the basis for designing the operational and evaluation components of the program, it should be worded in such a way that it is:

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- \* clear and specific
- \* measurable
- \* attainable
- \* realistic
- \* time-bounded

Methodology:

The \* Draft Curriculum Guidelines for .....<sup>1</sup> prescribes an approach to consulting a community about setting behavioral objectives. The process of setting behavioral change objectives for an educational intervention involves taking the knowledge acquired through initial research back to the target community, establishing a dialogue with members about their perceptions of the problems, sensitizing them to the possibility of improving their well-being through behavioral change, and negotiating with them an interpretation of reality that will enable them to work together with the project staff to bring about the kind of change envisioned by trying out new, naturally acceptable behaviors.<sup>2</sup>

In structuring the statement of objectives, the planner should#

- \*indicate the target date he expects to produce his output
- \*indicate the main resources available for the campaign
- \*indicate the behavioral change expected
- \*provide a quantitative estimate of product acceptors

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**Examples:**

At the end of (no. of years), using barangay health workers as motivators and supported by print IEC materials, the campaign shall have been able to increase by (no.) per cent the number of mothers who have their babies immunized.

**2. Audience Segmentation**

In a given community, the planner is faced with a population of diverse socio-economic, religio-cultural, and demographic profiles. Having identified the desired behavioral change, the planner has to determine who among the population can best respond to and will benefit most from his intervention.

An actual audience segmentation exercise identifies quantitatively the relative importance of each of the various audience groups that the campaign will be addressed to. This facilitates the prioritizing of campaign budgeting and programming.

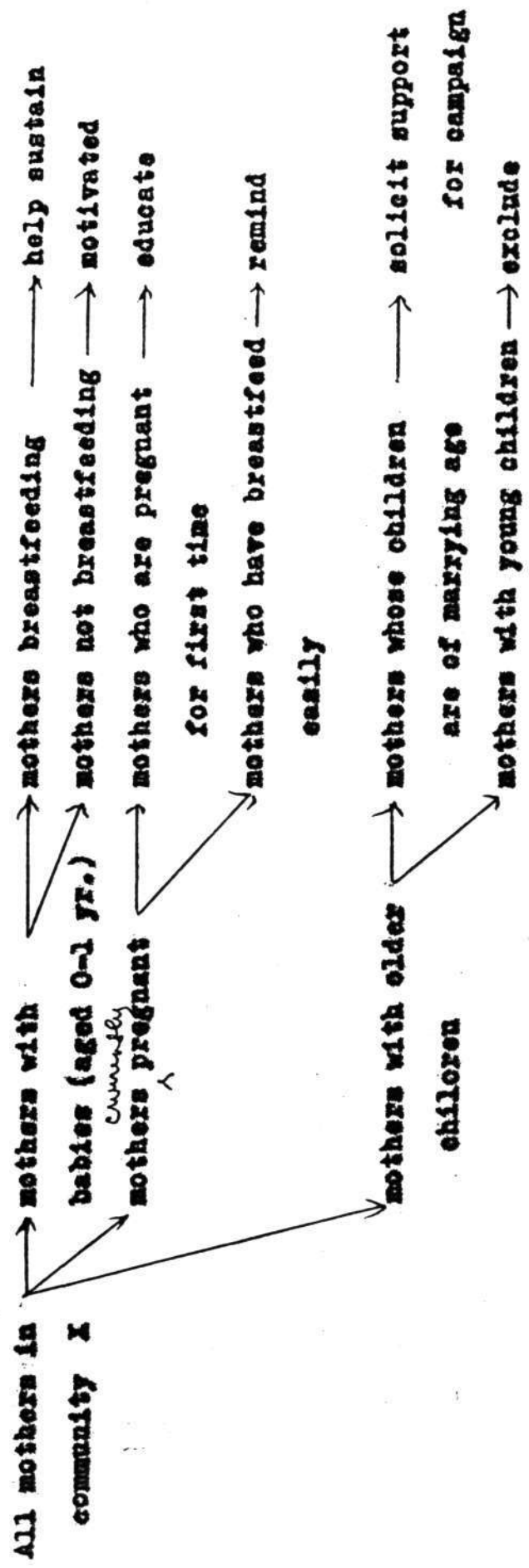
However, the quantitative approach to audience segmentation may be too tedious, and even unnecessarily sophisticated for a planner of a social marketing program. Another approach would be to simply break down various groupings in a community into smaller units. How the members of a population will be classified into groups depends on the objectives of the program.

For example, a program on breastfeeding will necessarily target mothers in the community. And an audience segmentation for this group would be:

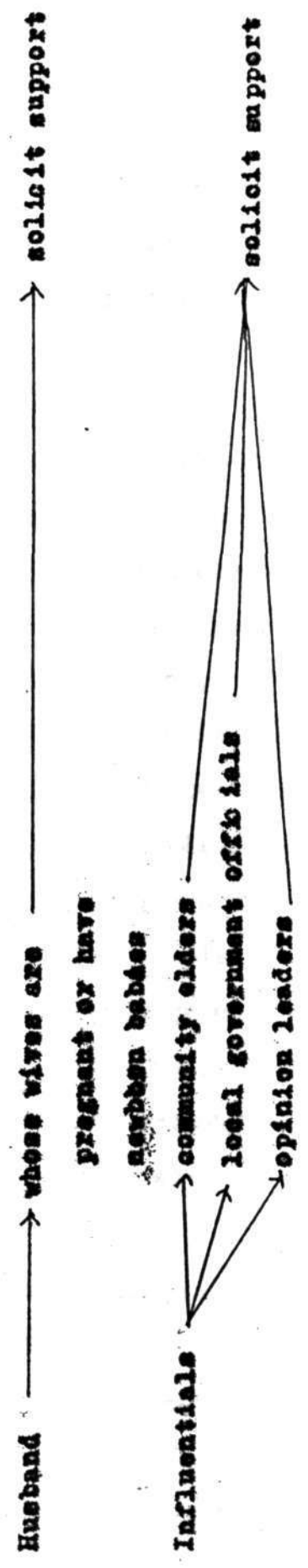
Required Intervention

Segments

Primary target GROUP



Secondary target GROUPS



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The example given illustrates that by segmenting an audience, the planner becomes aware of the different unit groupings that compose a larger group. This way, the planner knows that while his main target audience are the married women in the community, the unit groups call for specific messages that would help define the behavior change required per unit group.

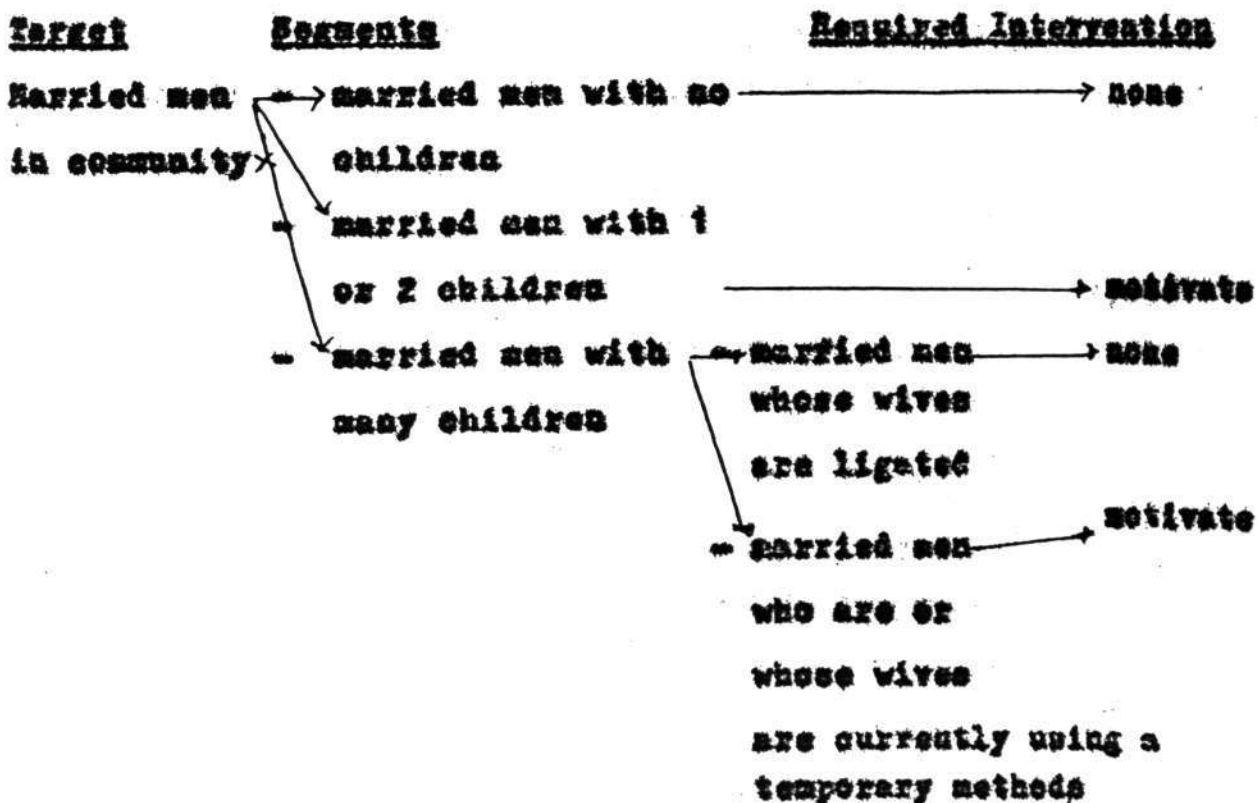
The example given also shows a distinct approaches difference between social marketing and commercial marketing approaches. Commercial market planners address their messages directly to end-users, e.g., those who will buy a soap or tooth-paste brand. Social marketers on the other hand make sure they address not only the prospective accepters but also the groups of persons who may be able to influence the decisions of the main target audience of the social development programs. This explains why social marketing programs have primary target audiences as well as secondary target audiences. Primary targets are usually the actual targets of a campaign, e.g., married couples for a family planning campaign or adolescents for a campaign on delayed marriage. Secondary targets are the opinion leaders, informal community leaders, community elders and others persons who may be able to influence the decision of the primary audience to accept the suggested behavioral change.

In social development programs, breaking down the target group into several segments may not be too practical due to budgetary and manpower limitations. Identifying several segments of the target group implies the need for developing campaign materials and even applying different strategies for each segments.

Hence, this is not practical in all programs.

**Methodology:** The process of audience segmentation starts with the planner's identification of the particular group he wants to address in his campaign. The group may be the married men, mothers, or even the influentials in the community. Having pinpointed the target group, the planner further classifies the sectors in his target group depending on the objective of his campaign.

An example, whose married men are the main targets. However, one has to further qualify who among the married men he really wants to offer vasectomy to. Definitely, the planner cannot address his message on vasectomy to all married men in his campaign area. He has therefore to determine who among the married men would be open to vasectomy and these would be married men with three or more children. Following this example, the planner would have dichotomized his target group thus:



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### 3. Product Definition

**Definition:** The product for a social marketing program may be a specific idea, manufactured good, service, or a behavioral pattern that the planner wants his identified audience to understand, accept, and adopt.

In defining the product, the planner should make an informed judgement of what the audience needs, what it would find acceptable, and what it has the practical ability to undertake. The planner should keep in mind that the product should be compatible with national culture. The product should <sup>also</sup> be consistent with the defined behavior change objectives.

Example of products for a social marketing program are:

- service - health check-up; immunization
- manufactured good - contraceptives
- idea - the concept of planning one's family
- behavioral pattern - washing's hand before a meal

#### Methodology:

The definition of the product results from a series of activities consisting of idea generation, screening, concept development, and testing.

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The planner may generate ideas for a product from a variety of sources including the target community, program managers, documents on other social marketing experiences, etc. The "product ideas" are screened to assess which best satisfy the campaign objectives and are feasible within the given structure and resources.

The screening trims the choices to just a few ideas for development into a product concept. A product concept provides a description of the product practice, specifies what its benefits are, and what needs it is designed to meet.

These product concepts are tested among members of the target population in terms of acceptability and relevance. The testing process includes asking the respondents to rank the alternative concepts in order of preference. The test results help the planner determine product concept should be offered in the campaign.

#### 4. Campaign Design

The campaign design provides the structure for the entire campaign operation. The planner crystallize the directions set by his defined objectives, identified target audience, and product as he undertakes the following steps:

##### 4.a. Messages formulation

###### Definition:

The message is the explicit statement of what product the planner wants his target audience to adopt and the benefits that await him if he accepts the product. The message is structured in a way that will make the audience listen, understand, and accept it.

According to the Draft Curriculum . . . . .

Good messages attract the attention of the target audience, hold their interest, instill in them a desire for the benefits associated with the new product or behavior, and instigate them to undertake the actions necessary to achieve these benefits.

While a given a social marketing campaign may strive to promote a whole complex of related behavior change objectives (e.g. different feeding practices for different family members) individual messages should focus only on single-self contained behavior. It is difficult, especially through mass media, to get an audience to absorb more than one major concept at a time. For that reason messages should be keyed to the promotion of a pivotal behavior identified as a result of project research investigations. Where possible the message should be repeated within the context of a single material or in a series of complementary materials.

Effective messages are:

- brief and concise
- believable and understandable
- contains a single idea
- culturally relevant
- practical
- Attractive and interesting

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A planner may need to develop more than the message depending on the needs of the specific segments of the target group.

Methodology:

To be able to formulate the message, the planner must first have an in-depth understanding of the social development problem he is concerned with. This way, he will be able to formulate the message in the context of how the intervention can solve the identified problem in the community and in light of the identified acceptance/resistance of the target audience. The message should always be pretested with a sampling of the target audience to determine the degree to which it will be understood and accepted.

4.b. Media mix

Definition:

In any campaign, the planner will need to use various forms of media to reach his audience. It is important for the planner to identify exactly what media he will use and to what extent each medium will be used. In identifying the media mix, the planner may ask himself the following questions.

\*How can I best communicate my message?

\*What will be my main medium for communicating my message? Do I need any support media? If yes, what support media do I need?

\*To what extent will I use each medium?

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The choice of media for the campaign should take into consideration the following factors:

- \*media available in the campaign area
- \*media habits of the target audience
- \*media reach/frequency
- \*funds available

#### Methodology:

The planner must first decide on the media mix he will use for the campaign before he develops any material. Since it is the selected media that to a certain extent shapes the decision of the campaign.

In selecting the media for his campaign, the planner analyses his audience, his objective, the costs and characteristics of media available in the community, and the production facilities and equipment available to him.

#### 4.c Concept, Design, and Pre-test of Campaign Materials

##### Definition:

The materials are the concrete evidences of any on-going campaign. Materials may be in print form (leaflets, posters, flyers, advertisements in newspapers, etc.) or in audiovisual form (slide-and-tape presentations, films, VTR, etc.). Other materials are classified as special media--billboards, t-shirts, caps, etc. The concept and design of the materials should be consistent with the socio economic, religion-political circumstances of the target audience. One designed, prototype copies should be pre-tested/field tested among a sampling of the target audience to determine the level of acceptability (format, design).

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understandability (language, tone, content formulation), attractiveness, and relevance of the material to the target audience.

Methodology:

In developing materials, the planner has always the target audience in mind. Thus, the choice of style, language, tone, and the nature of the material itself will be based on the audience characteristics.

ad. Distribution Scheme.

Definition:

Campaign materials are of no use unless they are properly distributed among the identified end-users. The planner should identify the specific user of each material and plan the delivery scheme for each material. The scheme should be adjusted to the available delivery systems in the campaign area. In some cases, the distribution scheme of a social marketing program may also refer to the proper placement of the product--goods or services -- so that these are easily accessible to the target audience. This may include, for example, making sure that the health service being promoted together with the required medicine are available in the health center servicing the campaign area. Or, it may also include the use of commercial outlets for the product, such as making contraceptives available in sari-sari stores.

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### Methodology:

Whatever distribution scheme is required by the campaign the planner should remember that the <sup>imal</sup> optional marketing strategy is the one that delivers the good, services, and information materials most effectively and efficiently in terms of the campaign objective, audience needs, and within available resources.

#### 4e. Training of Change Agents

##### Definition:

Change agents are those persons who can play a distinct role in reaching the target audience of the campaign. A campaign may have one or more groups of change agents. A campaign on health may have barangay health workers and the health center personnel working together as change agents. These change agents have to be oriented on the campaign and even given the skills needed to help them perform their identified roles in the campaign.

##### Methodology:

The planner prepares orientation or training programs for the change agents to be involved in the campaign. Each training program should have its own design which would spell out the objectives of the particular training program, duration, number of participants per program, etc. The social market planner would need the expertise of a training specialist to design the program.

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#### 4.f. Networking/Linkages

##### Definition:

Networks or linkages may be intra and/or intersectoral collaboration among and between individuals, organizations, and agencies in planning, implementing, and/or evaluating a project or a program.

Networks and linkages seek to foster community involvements which is essential for lasting success in any program. They stimulate and encourage individuals and agencies working in the community to see the importance and need for joint action in identifying their priority or left needs, problems and possible solutions to these. Networking is vital in operationalizing any social marketing program. The program planner should therefore consider tapping the participation of all sectors (government or private) as needed, particularly at the pre-planning stages.

The degree of networking varies in social development programs. Project resource requirements may need only an intra-agency and community involvement as in the pilot implementation of projects. Other social development projects, however, may need multi-agency and intersectoral collaboration. To determine the feasibility of networking or linkages, dialogue with key officials in the community should be conducted at the outset. Social preparation and training are basic at this stage.

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### **Methodology:**

Identify all resources and sectors/agencies which can be tapped for the project.

\*Arrange for a consultation meeting with heads of participating agencies to plan and discuss activities/linkages

\*Dialogue with key officials in the community together with heads/representatives of participating agencies/sectors.

\*Finalise plan of networking operation.

### **5. Evaluation**

#### **Definition**

Evaluation is the process of gathering and analysing data on the impact of the campaign in the target area while it is going on and when it has ended. The data analysis is always done in the context of the campaign objectives.

#### **Methodology:**

The planner designs two forms of evaluation schemes: formative and a summative evaluation. According to the Draft curriculum, formative evaluation is the process used to respond to issues surrounding improvements in the functions of existing projects. There are two major types of improvement decisions in formative evaluation in social marketing projects -- the first is improvement of the process of a project; the second is the improvement of the content and format of messages disseminated by the intervention.

Summative evaluation, on the other hand, is defined as the assessment of the extent to which a project is achieving its desired impact, and whether it is accomplishing its goals with an acceptable or optimal level of efficiency.

## 6. Resource Requirements

### Definitions:

Resource requirements are inputs needed for the project campaign of the program to achieve its goals. Resources may be categorized into 5 m's man (manpower), money (budget), machinery (facilities, equipment), materials and moments time. In planning social marketing program an important consideration to look into is the budget allotted for the project as well as available resources because the cost of social marketing cannot be recovered from the consumer or target clients unlike in commercial marketing.

### Methodology:

In identifying resource requirements, the planner should review the data gathered in the pre-planning stage and look for available resources in the community and other resources outside the community which can be tapped. Most important, he has to identify possible source of funding for the project.

The following simple checklist may help the planner in preparing resource requirements for any project.

#### LIST OF RESOURCES REQUIRED

##### a. Man (Manpower)

#### Technical Staff

- consultants
- trainers
- resource persons
- research special list
- health personnel, other professionals etc.

#### Administrative Staff

- clerk/typist
- secretary
- technicians

#### Field Staff

- Regional/Provincial/District/Municipal coordinators

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health personnel, other allied professional workers etc.

- Barangay Health workers

- Volunteers

**B. Money (Financial)**

- Salaries/Honoraria
- Field trips
- Materials development
- media placement
- Training expenses
- Implementation expenses
- research
- monitoring & evaluation

**C. Materials**

- Office supplies
- Orientation/Training kits
- IBC materials
  - leaflets
  - posters
  - flyers
  - pamphlets
  - comics

**D. Machinery (Facilities & Equipments)**

- Office equipments
- Audio-visual equipments
- venue/building or facilities
- vehicle

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## MOMENT (TIME)

- Schedule for project activities (refer to timeframe)

### Time Frame

#### Definition:

Time frame refers to the period of time during which the planner intends to carry out the campaign. The planner should schedule how much time he intends to allot for each phase of the campaign strategy from planning to evaluation.

The duration intended for a social marketing project to achieve its objectives requires careful planning to avoid loss of valuable time, money and effort. All activities to be undertaken should be reasonably and realistically scheduled. Scheduling should take into consideration socio-cultural life-style, religious festivals, or holidays as well as season or climate (whether dry or wet).

Any kind of on-going program must ensure that its schedule is regular, frequent and convenient for the target population. The target audience/clients participation or acceptance of a program depends largely also what "time of the day" a certain campaign/activity is scheduled. Time therefore is an important element which must not be overlooked.

### Methodology:

The planner lists project activities in sequence. He also indicates the duration of each activity within the set period for the entire project in terms of weeks and months of the year.

### Activities

#### I. Individual Case Study

**Assumption:** A case study on a social marketing experience is given as an exercise of this unit.

- . Prepare a critique by analyzing the case in terms of:
  - objective (s) set
  - audience segmentation
  - product definition
  - campaign design
  - evaluation scheme
  - time frame
  - establishment of linkages
- . Present/discuss the critique.

#### II. Group Sharing

Ask the group attending the class/session to react to the critique of the case study presented.

#### III. Workshop

- \*Form small groups of 5 or 6 members.
- \*Give a situationer or case to each group
- \*Let them identify the specific problem to be addressed to in the case given.
- \*Ask them to prepare a project campaign plan using a social marketing strategy.
- \*Formulate message (s) for the campaign plan.
- \*Identify the media to be used for each messages developed.

LEARNER'S EVALUATION

UNIT II

1. What factors should you consider in setting an objective for a social marketing program.
2. How would you state your objectives?
3. How would the audience segmentation help you in planning a SM program?
4. What does product refer to in a social marketing program? Give examples.
5. What should a message for social marketing effort contain?
6. How do you determine media-mix?
7. Why should a message be pre-tested or field-tested?
8. What is formative evaluation? Why is it important to do a formative evaluation?
9. What is a summative evaluation? What is its purpose?
10. How would you as a planner determine your resource requirements?
11. What is the key factor or reason for drawbacks regarding this kind of campaign?
12. What does time frame refer to?
13. In planning a project or a campaign, what factors should be considered to avoid wastage of resources?

## UNIT THREE: IMPLEMENTATION STAGE

This unit operationalizes the project design. It puts into action and attempts to integrate the main components of a project, namely: social preparation, training, monitoring and formative evaluation, development and dissemination of materials and resource mobilization.

### A. KEY CONCEPTS AND THEIR DEFINITIONS

**Key Concepts:** Social preparation, Training, Development and Dissemination of Materials, Monitoring and Formative evaluation and Resource Mobilization.

#### I. Social Preparation

##### a) Definition

Prior to full implementation of a project, implementors are advised to condition target clientele to accept and act according to project plans.

Social preparation includes meeting with local government officials of a community to get their approval and full support. It also includes orientation meetings with members of the barangay councils in order to establish active community involvement and participation in all aspects/phases of the project.

##### b) Methodology

Strategies employed in social preparation include posting of posters and streamers in strategic areas of the target community such as schools, chapels, sari-sari stores and the junctions and/or crossroads leading to the area.

The following steps are to be taken in social preparation:

1. Conduct consultative meetings with:
  - \* local government officials
  - \* community leaders
  - \* key informants or "star" members of the community
2. Sensitize leaders by:
  - \* presenting socio-economic (e.g., income levels, educational attainment), demographic data (e.g., family size, community population) and epidemiological data (e.g., health, prevalent ailments)
  - \* presenting project plans with emphasis on agency and clients/community counterparts
  - \* discussing "felt" needs of the target community/audience
3. Conduct community assembly to:
  - \* sensitize community/target audience
  - \* validate "felt" needs of target audience
  - \* orient the community/target audience on the project plans

## 2. Training

### a) Definition

Training aims to equip the project implementors with knowledge and skills to effectively carry out, monitor and assess the project. Training also essentially prepares project actors for their roles in planning, managing and coordinating overall implementation efforts to insure that project goals are reached. A full-fledged organization and training effort is geared toward identifying resources, organizing appropriate training activities and insuring effective utilization of available resources.

### b) Methodology

Training can either be live-in or live-out depending on the project needs and can be conducted at two levels -- one for the project staff and the other for field workers. In both cases, the participants, venue and duration should be decided upon beforehand.

#### A. For project staff

No. of participants:

Venue:

Duration:

##### 1. Training Components:

- o Strengthening the capabilities of the project staff to train and provide support to the field workers during the formal training sessions
- o Sessions on supervision and monitoring of project activities
- o Formulation of syllabi for the training of field workers including schedule of training, tools for supervision and project monitoring

##### 2. Strategies:

- o Lecture-discussion
- o Case Studies
- o Group Sharing
- o Workshops

#### B. For Field Worker/Project Implementor:

No. of participants:

Venue:

Duration:

##### 1. Training Components:

- o Sessions on how to effectively and efficiently implement a project
- o Lectures on Areas of Special Interest - e.g., simple health/nutrition subjects, treatment of simple/common ailments
- o Needs assessment to identify field workers' weaknesses in terms of KAS to perform the tasks expected of them after completing initial training
- o Sessions on development of capability to organize and sustain study groups for household teaching and information dissemination through media

## 2. Strategies:

- o Lecture-discussions
- o Group exercises/group sharing
- o Simulations/role playing
- o Field practice/practicum

## 3. Training for Target Audiences (Refer to Planning Stage)

## 3. Materials Development and Dissemination

### a) Definition

Materials provide the stylistic format and context for presenting the message to the target audience. Messages design must reflect the various stages of the campaign, i.e., creating awareness, effecting behavioral change, etc. Materials dissemination should consider distribution channels for messages. It should also include the four (4) basic forms of media: broadcast, print, interpersonal and community media.

- o Broadcast include radio and television
- o Print includes a wide range of materials from flyers to books and feature articles in newspapers
- o Interpersonal media include one-on-one contact by message provider and/or peer with the target audience
- o Community includes a wide range of both traditional and group communication channels such as theatre, puppets, story-telling, etc. and other community-produced materials.

Project implementors should also bear in mind that the choice of service delivery points determines the product's image and consequently makes the product acceptable or not acceptable to the target audiences. Project implementors must be reminded that the target audience and the target community are two important factors to be considered when developing and disseminating materials.

### b) Methodology

Messages need to be packaged in appropriate material format and transmitted through communication channels that ensure the greatest reach and frequency of contact with target audience. Media surveys and qualitative research studies of the way in which information get transferred in a community, help implementors effectively package and transmit messages.

The identification of target audience and target community help implementors decide on what types of materials to develop and what media to utilize.

1. Components

- o Sessions on educational messages formulation: educational communication, methodology; developing an educational material and campaign design.
- o Sessions on media placements
- o Sessions on choosing distribution outlets
- o Institutionalization and application of KAS gained

2. Strategies

- o Analysis of primary and secondary data, field surveys, etc.
- o Preliminary meeting on message conceptualization
- o Packaging of message
- o Choosing media mix
- o Pre-testing of materials
- o Revising or improving materials
- o Disseminating materials to distribution outlets

Example: Family Welfare Programme

Step 1: Conceptualization of an Overriding Slogan - RESPONSIBLE PARENTHOOD

Step 2: Development of Thematic materials -

Target	Theme	Medium
Married Class C	Spacing/Health/ Small Family Size	Newspapers/ Magazines/ Radio/TV
Married Class D-E	Spacing/Health/ Small Family Size	Magazines/ Komiks/Radio
Engaged Class C	Planning/ Small Family Size	Newspapers/ Magazines/ Radio/TV
Engaged Class D-E	Planning/ Small Family Size	Newspapers/ Komiks/Radio

Step 3: Developing collateral materials - brochures, stickers, posters and billboards to support promotional activities in the field.

Step 4: Pre-testing the materials - These were aimed at measuring the effectiveness of selected prototype print, radio and TV materials in terms of recall, understandability and persuasive/reinforcement value.

Step 5: Improving and/or revising the materials

Step 6: Disseminating materials to distribution outlets and/or media.

#### 4. Monitoring and Formative Evaluation

Monitoring and formative evaluation are necessary to give project implementors feedback so they can improve, retain or altogether change the project plan.

The need to analyze project results will also help shape the pattern of resource mobilization.

Monitoring in the implementation stage refers to the collection of data from the project beneficiaries specifically on current output based on set objectives, project progress and other similar information.

Formative Evaluation aims to test planning assumptions and measure the program's on-going impact. This technique will give the planner/social marketer an update on the process of implementation, i.e., whether or not the project is being carried out as planned. It will also enable the planner/social marketer to institute mid-course corrections and additions to the program as it progresses and will provide them with an opportunity to re-think their strategies.

##### b) Methodology

The actual conduct of monitoring and formative evaluation involves implementing the scheme drawn up in the planning stage. Monitoring and formative evaluation should be conducted with the following considerations in mind: a) expected outputs, b) time frame of the project, c) levels of AKAP change, and d) DCIPP.

Following are some of the vital information and/or questions that implementors should find out in monitoring and formative evaluation:

- o Is the project proceeding as planned?
- o What are the strengths and weaknesses of the project?
- o How many people are reading the materials?
- o Has the awareness level of the target audience/s increased, decreased or been retained?

#### 5. Resource Mobilization

##### a) Definition

Firstly, project implementors should have management skills to enable them to keep track of the project's progress. Project implementors should bear in mind that funds, technical and other forms of assistance are available from a major sponsoring agency as well as from other agencies. It, therefore, becomes essential to establish linkages with a lot of philanthropic and social development organizations.

More importantly, project implementors should also be able to harness the indigenous resources available in a

community, e.g., credit cooperatives, barangay health centers, etc.

Even if a project is fully funded by a specific agency, project implementors are advised to link up with other agencies which may be willing to assist the project.

#### b) Methodology

Resource Mobilization can be done by identifying and listing down local and international funding agencies and their priority programs as well as the indigenous resources in a community. A project proposal for co-financing, indicating how much funds or what types of assistance are requested from the agency should then be submitted. In the case of tapping of indigenous resources, project staff can arrange either co-financing agreements with them or tap them as proponent organizations that will do direct community work.

##### 1. Components

- o Sessions on how to acquire management skills
- o Sessions on accounting procedures
- o Process orientation on establishing linkages

##### 2. Strategies

- o Readings on management and accounting
- o Lecture-discussions by professionals and experts

#### B. ACTIVITIES

##### Activity 1 - Lecture-Discussion

Social marketing experts or practitioners can be invited to discuss and share their experiences in the field. An open forum/discussion could follow to allow participants to interact with the lecturers on the factors for success and failure.

##### Activity 2 - Practicum

The practicum or field practice activity hopes to expose participants to different aspects of implementation, namely: planning, operations, monitoring and evaluation.

##### Activity 3 - Group Sharing

After exposure to the various phases of implementation, participants will be encouraged to share their experiences regarding problems encountered as well as the solutions proposed to address those problems.

#### C. LEARNER'S EVALUATION

1. How do you go about socially preparing a community?
2. How do you identify and validate "felt" needs of target audiences?
3. How do you establish rapport with the community?
4. What are the necessary skills that should be acquired by:
  - a) Project staff
  - b) Project implementors
  - c) community volunteers

5. What factors should be considered in choosing distribution outlets for materials?

6. Which of the communication channels would you say is the most effective in advocating behavior change?

- radio
- print
- face-to-face

Why?

7. What types of materials can be developed?

- |                 |                     |
|-----------------|---------------------|
| ----- leaflets  | ----- radio scripts |
| ----- flyers    | ----- skits         |
| ----- pamphlets | ----- documentaries |
| ----- theatre   | ----- MTVs          |
| ----- puppets   | ----- songs         |

8. How can communication networks be established?

9. What can project implementors derive from monitoring?

- |                            |                        |
|----------------------------|------------------------|
| ----- problems encountered | ----- project outcome  |
| ----- project status       | ----- objectives       |
| ----- efficiency           | ----- goals attainment |

10. What does formative evaluation accomplish?

11. Why is resource mobilization important?

- For possible alternative funding sources
- For establishing linkages with other agencies
- For project implementors to keep track of project costs

## I. INTRODUCTION

The Social Marketing process involves a set of highly interrelated, sometimes continuous and overlapping, steps and activities that together help bring about a successful program. Often this success is measured by the degree to which the program is research-based and attuned to specific audience needs and resource capabilities. This implies the need for careful planning and organization. A social marketing program must consider its main elements systematically, and often, simultaneously in order for it to be considered effective.

The stages in the process, as presented in this module, follow a logical sequence: from pre-planning, to planning, implementation, and then evaluation. Each of the stages requires an adequate understanding of basic communication principles, marketing techniques, and social research methodology.

This module is an attempt to guide planners, implementors and researchers through the whole gamut of program development and designing, execution and control, as well as monitoring and evaluation. The tasks involved are gigantic, and the magnitude enormous, especially at the planning stage. However, as in all other action programs, a well thought out and realistic plan helps guarantee success. In this sense, this module becomes a friendly guide for any social marketer.

## II. OBJECTIVES OF THIS MODULE

After going through this module, the learner should be able to

- \* identify the different stages in the social marketing process; 179750
- \* describe the activities involved at every stage of the social marketing process;
- \* demonstrate skills acquired in designing, implementing, and evaluating a social marketing program;
- \* develop a specific social marketing program.

## III. UNITS OF THIS MODULE

This module consists of four units that correspond to the stages of the social marketing process, namely: 1) pre-planning, 2) planning, 3) implementation, and, 4) evaluation.

### Unit I. Pre-Planning Stage

This unit serves as basis for any social marketing program. It provides planners with baseline data that help set the direction and goals of the program. Specifically, this stage includes such essential activities as needs assessment, problem definition, identification of target audiences and communication networks, and resource inventory.

## Key Concepts and their Definitions

Key Concepts: Needs assessment, problem definition, identification of target audience, communication network, resource inventory

### 1. Needs Assessment

#### a) Definition

This refers to the process of identifying the actual or sometimes the perceived needs of the target community for the purpose of determining the best approach to social marketing. This is premised on the assumption that social marketing can only be effective if it is perceived to offer a product the people need. As a first step in the pre-planning stage, the importance of this process in ensuring the success of the social marketing program therefore cannot be underestimated for it bears upon all the other components of social marketing, particularly on the identification of the best communication strategy.

#### b) Methodology

1. Prioritize identified needs.
2. Conduct consultative meetings and focus group interviews with local leaders and other influentials to confirm or validate prioritized needs.
3. Input validated needs into the program plan.

### 2. Problem Identification

#### a) Definition

This refers to the process of defining and prioritizing the specific concerns of the community that a social marketing program must and can address. Sometimes, this requires an analysis of the potential resistance and/or acceptance points to a proposed program. For example, the felt need of mothers to help in augmenting the family income by working may be in conflict with the demands or expectations of a breastfeeding campaign and as such labelled as a potential resistance point. Again, this is crucial in determining the total social marketing strategy in so far as it provides information as to the best entry point for the program as well as give the planners the opportunity to anticipate the difficulties that must be overcome. It also enables planners to decide on the possible focus of the marketing effort given the range of needs identified under assessment.

b) Methodology

1. Review all available community data.
2. Depending on available resources, conduct field survey to assess AKAP levels of target audience.
3. Determine findings relevant to the development program.

3. Identification of Target Audiences

This refers to the process of identifying the intended receptors or beneficiaries of the social marketing product. It involves a comprehensive description of the socio-cultural characteristics of the target audience as well as a thorough analysis and understanding of the level of the people's awareness-knowledge-attitude-practice (AKAP) of the program components. A proper identification of primary and secondary/intermediate audiences is an important factor in projecting market shares and designing effective marketing strategies.

b) Methodology

Most of the data needed in this step can be generated from the application of research methods, both qualitative and quantitative. To obtain the AKAP level of the target group, focus groups, unstructured interviews and other qualitative techniques may be used.

4. Identification of Communication Networks

a) Definition

This refers to the process of determining the natural built-in channels of communication whereby information is disseminated to community members. Specifically, it has to do with the network of informal kinship and non-kinship relationships which serve as conduits for the transfer of knowledge, beliefs and attitudes. This is an important resource to the project planning because it provides a cost-free and readily available mechanism by which information can be disseminated and as such, can be tapped in designing the project/campaign strategy.

b) Methodology

Communication networks can be identified by checking on the socio-cultural data on the nature of the target audience generated from the unit research activities. The questions most helpful at this point may be: Who are the influentials, opinion leaders,

and decision-makers among the target audience? Who do people go to for community-related information? What are the existing formal and informal organizations in the community? What is the structure of social kinship organization of the community?

## 5. Resource Inventory

### a) Definition

This refers to a survey of all available resources for the purpose of determining project costs as well as financial and other constraints. Included in such an inventory are cost estimates for project staff, consultants, logistics support, market resources, media time, talents, and materials development. Also included are built-in resources in the community such as local manpower, community networks, physical facilities and assessments of their capabilities and potential effectiveness. In certain instances, the budgetary allotment has been fixed beforehand and as such dictates the limitations within which planners must work. However, the planners must be creative enough to be able to tap alternative resources.

### b) Methodology

An initial resource inventory would entail a listing of all resources available in the planning office or agency which may be useful in undertaking the project. Following is a sample Resource Inventory Checklist:

Resources	Available	Not Available
1. Staff		
o Number		
o Qualifications		
2. Facilities & equipment		
o Library		
o Telephones		
o Health Center		
o Conference Halls		
o Audio-Visual equipment		
o Etc.		

## B. ACTIVITIES

### Activity 1 - Ocular Inspection

Initially an ocular inspection may be undertaken to get acquainted with the geographical and physical conditions of the target area. This also helps determine other factors important

in planning a program such as accessibility and resource availability. During the ocular inspection, observe the following:

- o means of transportation (accessibility)
- o climate
- o terrain
- o water supply and other health facilities
- o types of houses/buildings
- o other relevant data

#### Activity 2 - Secondary Data Analysis

Vital demographic information may be obtained through existing census and other archival data readily available in different government centers, e.g., municipal hall/libraries, National Economic and Development Authority (NEDA), National Census and Statistics Office (NCSO), and population centers. A lot of effort may be saved by checking out these information centers first before conducting any field research. This activity may provide basic population data and other information such as land area, socio-economic profile and historical background of the target community.

#### Activity 3 - Field Survey

This may be done through informal interviews or the use of structured self-administered questionnaires. These instruments can help generate household profiles useful in planning social marketing programs. AKAP surveys on certain issues also fall under this category. (Sample household profile to be provided later.)

#### Activity 4 - Focus Group

1. Invite 8-12 community influentials for a group sharing/interview.
2. A moderator guides the discussion towards identification of needs and problems.
3. Once the interview is completed, the moderator must be able to interpret the responses and observations obtained from the session.

#### Activity 5 - Synthesis

Out of the data gathered from activities 1-4, go through each of the steps in the pre-planning stage and come up with your own output on needs assessment, problem definition, identification of target audience and communication network and resource inventory.

C. LEARNER'S EVALUATION

1. Why is it important to identify the actual needs of the target community before planning out the social marketing strategy?
2. What may happen if SM planners consider only perceived needs and fail to take into account the felt needs of the people?
3. What is the advantage of converting needs into wants to SM?
4. In what way is problem identification important in planning?
5. How does problem identification differ from needs assessment?
6. What is the role of target audience identification in the total SM strategy?
7. What kind of information or data is needed to be able to identify the target audience?
8. In your own words, state the meaning of "communication network?"
9. What is the importance of identifying the communication networks in the target community?
10. What are included in resource inventory?
11. How does a resource inventory help in planning an SM program?

#### UNIT IV. EVALUATION STAGE

As the final stage in the project cycle, this unit aims to assess the effectiveness and impact of the social marketing program. More concretely, it attempts to measure the success or failure of the project in terms of specific indicators. These include such variables as audience reach, changes in levels of awareness, knowledge, attitude and behaviour, project resistance and/or acceptance points, as well as cost-effectiveness. Taken together, these factors constitute the summative evaluation for the program which may serve as basis for policy re-~~evaluation~~ ~~program re-~~ program re-planning and alternative courses of action.

##### A. Key Concepts and Their Definition:

1. **SUMMATIVE EVALUATION** - Evaluation is the common concern of funding sources or project sponsors, policy makers, project planners & project implementors. Usually, sponsors are after results that would help them make decisions on the sponsorship of similar projects, while planners and implementors are usually after transferability of experiences, or technology. Overall, evaluating the project in the end enables the project to generate guidelines in the development of future policies, programs and strategies.

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Summative evaluation as differentiated from formative evaluation (periodic assessment done during implementation phase) aimed at ~~identifying areas for program input while it is in progress~~) refers to review/assessments done at the end of the project. Its coverage is often more extensive & comprehensive than that of formative evaluation which focuses on specific stages or aspects or activities of the project. The need to analyze project results also helps shape the pattern of similar future programs. If the project for instance seeks to demonstrate its ability to change behavior or improve program status, then a significant amount of research effort needs to be directed at impact assessment. This may require a thorough survey design, and framework for, data processing & analysis. Some projects can avoid expensive evaluation design by relying on available documents, i.e., secondary review of results of formative evaluation, or sometimes rely on experts' assessments of the way the project was conceived & implemented. Other projects settle for single evaluation designs that make use of limited random sampling and concentrate on selected variables, e.g., audience reach, media exposure, training effectiveness, etc.)

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## 2. AUDIENOE REACH

This refers to both the quantity (e.g., number) and quality (e.g., type, characteristics) of audiences reached by a social marketing program/project.

For example, audiences reached may include

- married couples of reproductive age (MCRAS) who became family planning acceptors
- community leaders mobilized
- out-of-school youths trained
- extension workers given re-orientation
- families who received the service, etc.

## 3. AKAP - Stands for awareness, knowledge, attitude, and practice

Awareness: refers to the audiences' familiarity with concepts or terms used in the program/project which are often vague or very general, e.g., awareness of the phrase "family planning" without really knowing what it means.

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**Knowledge:** as contrasted from awareness, implies understanding/comprehension, not mere familiarity. (For example, knowledge of family planning could mean ability to name birth control methods & describe their use. It can also include an understanding of the population problem).

**Attitude:** is an indicator of the individual's predisposition to act/ behave as manifested by his positive, negative (sometimes indifferent) feeling towards an idea/object/person. <sup>△</sup>

**Practice:** refers to the actual practice or adoption of an idea, innovation, or service). In behavioral terms this could mean a visit to the clinic, use of family planning method, etc.) For example, a positive attitude towards family planning may be seen in a couple's willingness to ~~receive a home visit from a~~ <sup>discuss with</sup> health/FP worker.)

*Revised  
Example*

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4. PROJECT RESISTANCE POINTS - this refers to aspects of or areas in the project that the target audiences dislike, resist or reject. As such they could be considered indicators of failure or weaknesses/limitations of the program/project.
5. PROJECT ACCEPTANCE POINTS - this refers to aspects of or areas in the project that the target audiences like most, prefer, or adopt. These may be considered indicators of success or strengths/assets of the program/project.
6. COST-EFFECTIVENESS: refers to such measures of program/project success as the attainment of goals as planned, increased knowledge, positive attitudes, adoption of practice or technology as well as efficiency factors such as <sup>optimum</sup> ~~maximum~~ use of supplies & materials, adherence to workplans & timetables, etc.

#### Methodology:

##### SURVEY:

- \* One shot Survey (~~expost~~ factb)
- \* Static group comparison
- \* Pre-test/Post-test Survey

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EXPERIMENT:

- \* One group (pre-test/post-test design)
- \* Comparison of treatment & control groups (post-test only) design
- \* Comparison of treatment & control groups (pre-test & post-test design)

CASE STUDY:

- \* Ethnography - use of participant observations, unobtrusive measure
- \* Focus group (key informants, client panels)
- \* Unstructured interviews - to uncover feelings and attitudes by allowing respondents a great deal of latitude in deciding what and how to answer.
- \* Process documentation

**B. Activities**

**ACTIVITY 1. GROUP WORK (1/2 day)**

In groups of 3-5, learners will be asked to discuss the possible indicators for success/failure of a sample social marketing program.

The indicators will be used to draw up a prototype evaluation instrument for the said program.

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Each group will present their output to the other participants. In a way, this will be a kind of pre-test of the instruments to <sup>determine</sup> find out the validity of the questions/items included in the set.

The group will then be asked to make the revision as necessary.

#### ACTIVITY II. FIELD WORK (1 day)

Learners will visit 2-3 different organisations or institutions with social marketing programs that have been completed.

They will conduct interviews (or be given a lecture-discussion) with the evaluator(s) of the program.

The session will focus on:

- a) research method and instruments used
- b) schedule and duration of the evaluation
- c) findings of the evaluation
- d) problems/difficulties encountered
- e) how difficulties were overcome

#### C. Learner's Evaluation (Review Questions)

- 1) Briefly describe the evaluation stage of the social marketing process.
- 2) Differentiate summative from formative evaluation.
- 3) What does AKAP stand for?
- 4) How do you measure the cost-effectiveness of a program?
- 5) What are some of the indicators of success of a program? What about indicators of failure?  
Give 3 or for each.

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6) In <sup>one</sup> of 2 sentences, define the following concepts:

Audience reach: \_\_\_\_\_

Project Resistance points: \_\_\_\_\_

Project Acceptance points: \_\_\_\_\_

7) What methods are commonly used by evaluators to assess <sup>a</sup> program? Name and describe the ones you know.