

SBC Checklist to Develop and Assess Costed Implementation Plans for Demand Creation

USER GUIDE



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Acronyms

CIP	Costed implementation plan
FP	Family planning
HIP	High Impact Practices
KM	Knowledge management
M&E	Monitoring and evaluation
RH	Reproductive health
SBC	Social and behavior change

Introduction

Investing in well-planned and effectively implemented social and behavioral change (SBC) initiatives is essential to meeting and exceeding family planning/reproductive health (FP/RH) goals and commitments. SBC is a discipline that uses an in-depth understanding of human and societal behavior and evidence-based interventions to increase the uptake of FP/RH behaviors by individuals and to influence the social norms that underpin those behaviors. SBC is guided by perspectives and approaches from a variety of disciplines, including social and behavior change communication, social psychology, anthropology, behavioral economics, sociology, human-centered design, and others. SBC seeks to change behavior by addressing factors such as knowledge, attitudes, and social and gender norms. According to [Breakthrough ACTION's Circle of Care™](#), there are three critical points in time when SBC interventions are most effective in creating demand for FP:

1. Before the use of the service (commonly considered demand creation).
2. During the use of the FP services (this may concern the behavior of the providers).
3. After the provision of the service (to maintain a communication link between the client and the provider).

Users of this checklist should collaborate with key stakeholders in the process of developing and evaluating costed implementation plans (CIPs) for SBC and demand creation interventions.

For Whom and Why?

Breakthrough ACTION intends the SBC Checklist for Developing and Assessing CIPs for demand creation interventions to help governments, donors, and implementation planning teams to ensure that users strategically integrate best practices in SBC with specific areas like gender and youth. The checklist describes the key elements including assessment, development, implementation, and monitoring and evaluation (M&E) and knowledge management (KM). These elements can be a major factor in the success of SBC interventions within a given project. This checklist guides users through a series of questions focused on best practices and High Impact Practices (HIP) to follow during planning, design, implementation, M&E, and KM of SBC activities for FP/RH. Using this checklist ensures practitioners create a CIP aligned with HIP, increasing the chances of achieving the desired results in demand creation.

Teams can use the SBC checklist throughout the CIP development process, from the engagement phase to launch. In particular, practitioners should use the checklist when analyzing the situation, defining strategies, planning activities, and establishing the costs of implementing as well as activity M&E.

The SBC checklist for CIPs can also be used during a CIP monitoring process to check if SBC activities are on track, if they are going according to recommended practices, and/or how they can be revised. While the checklist can help determine whether best practices in SBC and HIP are factored into the technical strategy, it is not intended to replace the type of in-depth assessment of SBC capacities that is necessary

to carry out the SBC components of the CIP. Additional tools to support SBC capacity assessment and implementation of SBC activities are available through the Compass, a curated collection of SBC resources offering the highest quality “how-to” tools and packages of materials from SBC projects.

Methodology

SBC programs can use the checklist as part of a workshop or in an extended meeting with all stakeholders involved in the assessment, development, or implementation of a CIP. Inclusive and participatory thinking will allow for the broadest possible picture of a CIP process. This workshop or meeting should include breaking out into small groups to allow for more specific discussions by section of the checklist. In each group, make sure to include the different levels of the health system, from the central (strategic) to the community (operational) level, and also include youth. The results of the group work should then be discussed in plenary in order to draw general lessons and make final weightings.

Adaptation

Although this checklist was developed for one country’s national-level CIP, many other SBC programs can use it, particularly those related to FP/RH. Programs should consider the following when adapting it to their needs:

- All questions on the assessment sheet and the five elaboration sheets can be modified as desired.
- The titles of the headings on the aforementioned sheets can be modified.
- The colors of the sheets are modifiable; however, they are the same colors that are in the dashboard.
- The resources and the links to them can be modified.
- The resource numbers can be modified, but they must point to the resources concerned.

What cannot be changed in the SBC Checklist:

- The elements of the dashboard are not editable.
- Rows in the sheets cannot be added or removed, because the dashboard is based on dynamic formulas and in some cases on absolute (fixed) formulas.

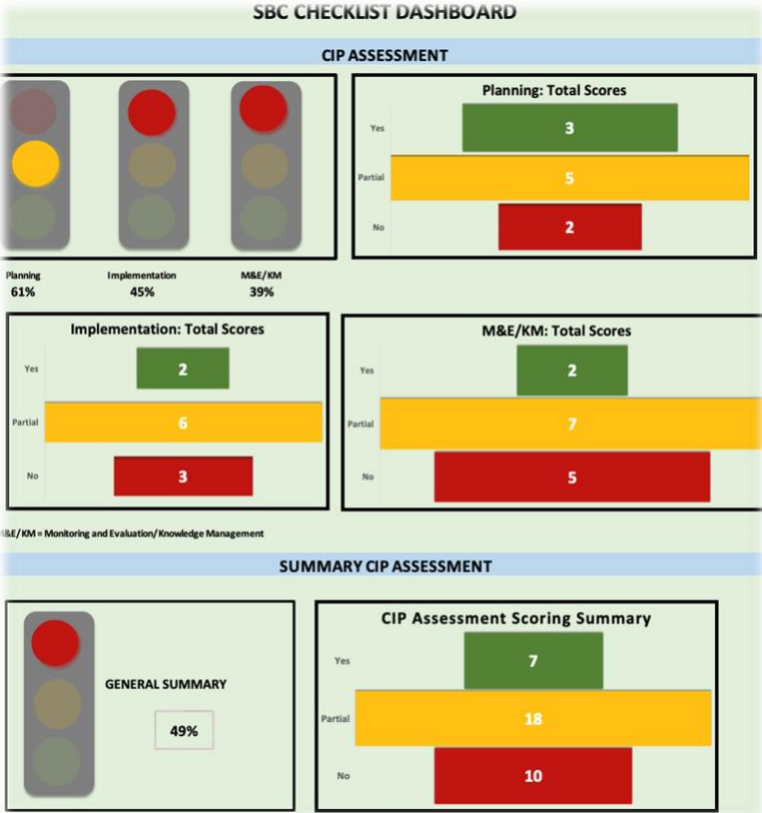
How to Use the Checklist

The checklist is divided into five parts:

1. **Introduction:** outlines the objectives and use of the checklist.
2. **Dashboard:** Provides an interactive, graphical overview of each step in the assessment or development of the CIP.
3. **CIP Development (five purple sheets):** Provides four groups of control elements for developing the CIP.
4. **CIP Assessment (five yellow sheets):** Gives one control element for CIP assessment and a list of recommendations.

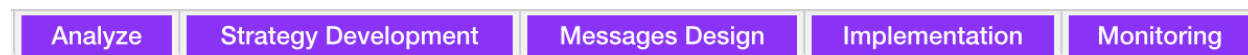
The Dashboard

The Dashboard makes it possible to visually assess the results of the SBC Checklist by using an interactive graphic giving an overall view of each step of the assessment or development of a CIP.



Note: For all sections of this checklist, the color red represents the answer **No**, the color yellow represents the answer **Partial**, and the color green represents the answer **Yes**.

Control Elements for “CIP Development”



The *CIP Development* section of the SBC checklist (the five purple sheets) provides the control elements for developing a CIP. This section consists of the following sheets:

1. **Analysis:** Allows users to assess the situational analysis, particularly the global and health environment, the social, behavioral, media and digital context, and the targets.
2. **Strategy Development:** Allows users to assess the adequacy of your plan to the key recommendations of high impact practices, gender, equity, and human rights, digital, taking into account specific targets such as youth.
3. **Message design:** To assess the adequacy between the situational analysis, especially the targets, the channels, and the recommended technical aspects of developing good messages.
4. **Implementation:** Allows you to assess the coherence between the strategy, the situational analysis, the coordination, and the operationalization of interventions.
5. **Monitoring:** Allows for an assessment of M&E and KM elements.

To use the CIP development sheets, the user should read each question and then determine whether each criterion was followed completely (yes) partially (partial) or not followed at all (no).

- A "yes" response indicates alignment with the criteria.
- A "partial" response suggests that the criteria were not fully met.
- A "no" response indicates that the criteria were not followed or applied.

A *Comment* column allows you to add comments justifying or supporting the answer given.

Regardless of the response—especially if it is “partial” or “no”—the users should either refer to the *Resources* column via the link that points to the resource or go directly to the Resource sheet by following the resource number (Example: R-1-1 or R-3-4). Some resources provide access to additional resources for implementation.

Control Elements for “CIP Assessment”



The *CIP Assessment* section of the checklist (the two yellow sheets) provides the checklist items for assessing a pre-existing CIP along with recommendations. This section consists of the following sheets:

1. **CIP Assessment:** Assesses key elements of the CIP including planning and coordination, implementation, monitoring, evaluation, and knowledge management of demand creation activities.
2. **Recommendations:** Provides a list of recommendations to address identified weaknesses or to reinforce strengths.

In the CIP assessment sheet, you will find a set of evaluation criteria to verify that demand creation activities have structurally and technically met the recommended practices in SBC in three major domains: planning and coordination, implementation, and M&E and KM.

To use the CIP Assessment section, read each question in the “CIP Assessment” sheet and determine whether the criterion was followed completely (yes) partially (partial) or not followed at all (no).

- A “yes” response indicates alignment with the criteria.
- A “partial” response suggests that criteria were not fully met.
- A “no” response indicates the criteria were not followed or applied.

A *Notes* column allows you to add comments justifying or supporting the answer given.

Regardless of the response—especially if it is “partial” or “no”—the team should refer to the Resource sheet by following the resource number (Example: R-1-1 or R-3-4). Some resources provide access to additional resources for implementation.

How to Read the Results

Development

The phases of analysis, strategy, design, implementation, and M&E and KM are graphically assessed in three ways:

- In a global manner in the “Summary” section through a graphical representation of a gauge (traffic lights) expressed as a percentage.
- In detail through a histogram representation on the number of Yes, Partial, and No answers.

Assessment

The phases of analysis, implementation, and M&E and KM are assessed graphically in three ways:

- Globally in the Summary section through a graphical representation in the traffic light gauge, expressed as a percentage.
- In detail through a histogram representation on the number of Yes, Partial, and No answers.