FORMATIVE RESEARCH METHODS IN SOCIAL MARKETING
CFH PHC 6705
Summer 2007

Dates: June 14 – 18, 2007
Location: Bilirakis Room, Chiles Center
Credit Hours: 3
Pre-Requisites: Introduction to Social Marketing is strongly recommended.

Required Materials: Specify what students need to purchase or have to successfully complete class
Examples: Textbook (link to order form from HSC bookstore [http://itt.usf.edu/publichealth/CourseGlance-Spring2006/HSC_GradTexbook_OrderForm.pdf]
Supplemental Reading Packet available at the COPH Copy Center

COURSE CONTENT AND DELIVERY

Course Description: This course is designed to familiarize students with the basic principles and techniques in conducting formative research for social marketing program development. The major topics covered include: principles of formative research design, qualitative data collection methods, interviewing techniques, qualitative data analysis, survey design, pretesting, and implementation, ethical principles and protection of human subjects.

Course Objectives: At the end of the course, students will be able to:

1. describe the goals of formative research in social marketing and health communication program development
2. use a systematic planning model to develop formative research objectives
3. discuss the appropriate uses of qualitative and quantitative research methods in conducting formative research
4. discuss the advantages and limitations of participant observation, in-depth interviews and focus group interviews in social marketing planning research
5. list the basic principles of interviewing
6. develop an in-depth interview guide
7. develop a focus group moderator's guide
8. list the basic principles of moderating a focus group
9. conduct an in-depth or focus group interview
10. analyze qualitative data
12. prepare a written summary of qualitative research
13. design a survey instrument
14. pretest a survey instrument for use in mail or door to door data collection
15. list the responsibilities and key tasks for coordinating a door to door survey
16. discuss ethical issues associated with formative research and principles for protecting human subjects
17. pretest concepts and promotional materials
18. design the formative research for a social marketing project.

**Delivery Format:** Most class sessions combine lecture with a lively class discussion and exercises. Because the classes are held in a one week period, a great deal of information must be covered in the reading materials. Students do best if they read the assigned materials prior to the one-week class format. Familiarity with the readings facilitates participation in class discussions, and leaves more time during the evening and weekends to complete other assignments. All assignments require students to apply the knowledge and skills covered in the readings and class sessions to outside activities. Therefore, students are expected to read the assigned readings **before** the class meets on June 14th.

**FACULTY AND TECHNICAL ASSISTANCE CONTACT INFORMATION**

**Instructor:** Carol A. Bryant, Ph.D.
Department of Community and Family Health

**Contact Information:**
Telephone: 813-974-4867
Address: Room 2027, 13201 Bruce B. Downs Blvd., Tampa, 33612.
Email: cbryant@health.usf.edu
Office Hours: You are welcome to drop by anytime. Because I am often in meetings or working on a project, I recommend you make an appointment whenever possible.

Preferred Method of Contact: email, but you are also welcome to drop by my office at any time or call me. Please let me know if you have any difficulties with the class. Suggestions for improving the course are always appreciated.

Reply Policy: You can expect a reply from me in 48 hours unless I am out of town.

GRADING/ASSESSMENT CRITERIA

If you want a grade submitted during the summer semester, all assignments must be submitted to me by July 16th. If you would like an extension, I would be happy to submit an incomplete for the summer semester, and change your grade later when all assignments have been submitted.

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Points</th>
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<tbody>
<tr>
<td>1st Paper</td>
<td>5</td>
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<tr>
<td>Field notes</td>
<td>5</td>
</tr>
<tr>
<td>Interview Notes</td>
<td>5</td>
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<tr>
<td>Focus Group Tape and notes</td>
<td>15</td>
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<tr>
<td>Data Analysis</td>
<td>10</td>
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<tr>
<td>Revised Survey Questions</td>
<td>5</td>
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<tr>
<td>Final Research Report</td>
<td>25</td>
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<tr>
<td>Formative Research Proposal</td>
<td>25</td>
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<tr>
<td>Class Participation</td>
<td>5</td>
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<tr>
<td><strong>Total Possible</strong></td>
<td><strong>100</strong></td>
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</tbody>
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Grading Scale:

- 98 - 100 = A+
- 93 - 97 = A
- 90 - 92 = A-
- 87 - 89 = B+
- 83 - 86 = B
- 80 - 82 = B-
- 77 - 79 = C+
**Incomplete Policy:**

Indicate policy and procedures
[http://publichealth.usf.edu/academicaffairs/academic_procedures.html](http://publichealth.usf.edu/academicaffairs/academic_procedures.html) An "I" grade may be awarded at the discretion of the instructor only when the student is otherwise earning a passing grade and only if the incomplete is due to the omission or fault of the student. Fifty (50%) percent of coursework must be satisfactorily completed to be eligible for an incomplete grade. Students are to download the Contract for Incomplete Grades form. The contract should include a description of the work to be completed, the date by which the work is to be submitted and should be approved and signed by the course instructor.

Students complete the following steps -

Download and complete the Contract for Incomplete Grades on the COPH forms page
2. Get the required signatures
3. Submit to the COPH Academic Affairs Office

**Late assignments:**

You are welcome to take an incomplete in the course so you can complete assignments later in the summer. I strongly encourage you, however, to plan to complete them before the fall. Students who wait longer than a few months find they have forgotten a lot of material covered in class.
**INSTRUCTOR POLICIES**

**Instructor Expectations:** Most class sessions combine lecture with a lively class discussion and exercises. Because the classes are held in a one week period, a great deal of information must be covered in the reading materials. Students do best if they read the assigned materials prior to the one-week class format. Familiarity with the readings facilitates participation in class discussions, and leaves more time during the evening and weekends to complete other assignments. All assignments require students to apply the knowledge and skills covered in the readings and class sessions to outside activities. Therefore, students are expected to read the assigned readings **before** the class meets on June 14th.

**Attendance/Class Participation:** Students are also expected to attend all sessions and make time during evenings and the weekend of June 11th and 12th to complete the other assignments described below. After the course sessions conclude, students must prepare a final report and formative research proposal. If they would like a grade submitted for Session C, they must submit their final paper by July 16th.

**Permission to use Lectures:** State your policy about the distribution and use of any materials in your course including audio (taping), video and print or electronic documents.

**INSTITUTIONAL POLICIES**

**Link to Student Handbook:** [http://www.sa.usf.edu/handbook/](http://www.sa.usf.edu/handbook/)

**Student Conduct:** [http://www.sa.usf.edu/handbook/rights/StudentCodeofConduct.htm](http://www.sa.usf.edu/handbook/rights/StudentCodeofConduct.htm)

**Academic Dishonesty:** The University of South Florida has an account with an automated plagiarism detection service which allows instructors to submit student assignments to be checked for plagiarism. I reserve the right to 1) request that assignments be submitted to me as electronic files and 2) electronically submit assignments to Turnitin.com. Assignments are compared automatically with a huge database of journal articles, web articles, and previously submitted papers. [http://www.grad.usf.edu/newsite/catalog/main.asp](http://www.grad.usf.edu/newsite/catalog/main.asp)

Click on section 6 “Academic Policies”
**Special Accommodations:** Disabilities: Any student with a disability should be encouraged to meet with the instructor privately during the first week of class to discuss accommodations (See Student responsibilities: [http://www.sds.usf.edu/Students.htm](http://www.sds.usf.edu/Students.htm)). Each student must bring a current Memorandum of Accommodations from the Office of Student Disability Services that is prerequisite for receiving accommodations. Accommodated examinations through the Office of Student Disability Services require two weeks notice. All course documents are available in alternate format if requested in the student’s Memorandum of Accommodations. (See faculty responsibilities: [http://www.sds.usf.edu/faculty.htm](http://www.sds.usf.edu/faculty.htm), [http://www.asasd.usf.edu/index.htm](http://www.asasd.usf.edu/index.htm)).

**Holidays/Religious Observances:** Students who anticipate the necessity of being absent from class due to the observation of a major religious observance must provide notice of the date(s) to the instructor, in writing, by the second class meeting. [http://www.sa.usf.edu/handbook/policies/ReligiousPracticesPolicy.htm](http://www.sa.usf.edu/handbook/policies/ReligiousPracticesPolicy.htm)

**ADDITIONAL RESOURCES**

**Library Resources:** ‘How to Find a Journal Article’

USF Library Resources and Services:
[http://www.lib.usf.edu](http://www.lib.usf.edu)

**Plagiarism:** Tutorial on Plagiarism for Students
[http://www.cte.usf.edu/plagiarism/plag.html](http://www.cte.usf.edu/plagiarism/plag.html)

**Safe Assignment:** Instructions to submit an assignment using Safe Assignment
[http://itt.usf.edu/technology/plagiarism/studentman.pdf](http://itt.usf.edu/technology/plagiarism/studentman.pdf)

**How to Create a Citation**
[http://owl.english.purdue.edu/handouts/research/r_apa.htm#General%20Format](http://owl.english.purdue.edu/handouts/research/r_apa.htm#General%20Format)

**APA Style:**
[http://www.isr.bucknell.edu/img/assets/6535/apa.pdf](http://www.isr.bucknell.edu/img/assets/6535/apa.pdf)
[http://www.apastyle.org](http://www.apastyle.org)
COURSE OUTLINE AND ASSIGNMENTS

Thursday, June 14th
Overview of the Role of Formative Research in Social Marketing
Steps in the Formative Research Process
Research Design
Mixed Methods
Data Collection Methods

Friday, June 15th
In-depth Interviews

Saturday, June 16th
Focus Groups

Sunday, June 17th
Qualitative Data Analysis
Survey Instrument Design

Monday, June 18th
Pretesting and Pilot testing Surveys
Survey Methods and Managing Survey Projects
Reporting Formative Research Results

Assignments

Your assignments should all focus on the same topic and be designed to generate the information needed to develop a marketing plan to promote a socially beneficial behavior, service, or tangible product. Examples of projects from previous classes are: physical activity, breastfeeding promotion, annual mammograms, etc. You are also welcome to work in teams. If you do not have a topic, you may want to join a few other students who are interested in promoting spaying and neutering of pets. Here is a description of the problem they plan to address:

Currently, just under 30,000 dogs and cats are put to sleep each year in Hillsborough County due to overpopulation. High volume, targeted spay/neuter programs have been shown to be the most effective means of reducing this problem. There are several resources and clinics available in the county that target low-income individuals with low cost spay/neuter services. No More Homeless Pets in Hillsborough County is looking for a way to determine the best way to market these services to the indigent population, as well as learn the best way to educate them on spay/neuter and convince them it is good for them and their pets.

Feel free to email me if you want to discuss your topic or get my help in focusing on something that you can complete in this class.

Before class begins: Read the material assigned for the first day (listed below) and prepare an outline describing the methods you would use for your project. For this exercise,
imagine you have unlimited time and money for the formative research phase of the project. State what study design you would recommend: mono method, sequential mixed study, parallel/simultaneous mixed study, equivalent status mixed study or dominant-less study design) and then briefly describe the specific data collection methods you would use for the study. The length doesn’t matter but I expect you would need more than one page and less than five pages. The average has been 2 – 3 pages. Bring the paper and your ideas to class on the first day.

Day One: Readings Covered


Visit the PhotoVoice website http://www.photovoice.org/

Assignment (due day two): Observe a public event or activity related to a topic of interest. Try to develop a general research objective to guide your participant observation experience, e.g., to observe what people eat, how they shop, or use a Laundromat. Try to think of something to observe that allows you to to some extent. Write about three pages of notes describing the event. Be sure to describe your role as participant observer (i.e., place your self in the setting and describe how
the event makes you feel) as well as your observations of the event. If you develop follow up questions or hypotheses, be sure to record them, too.

Day Two: Readings Covered


Assignment: Conduct an in-depth interview and submit summary of findings

Day Three: Readings Covered

Morgan, David and Krueger, Richard
The Focus Group Kit
Volumes 2, 3, 4, and 6

Assignment: Moderate or Co-moderate a focus group and submit the back up tape

Day Four: Readings Covered


Assignment: Finish analyzing data set and submit a list of key findings (may put in bulleted or outline format)

Day Five: Readings Covered


**Assignment:** Pretest your survey questions. Use results to revise five questions.

**Final Assignments:**
- Conduct 5 more in-depth interviews or 1 focus group.
- Prepare a final report summarizing results of your interviews and the data distributed in class.
- Write a proposal for conducting a formative research study to develop a social marketing project on a topic of your choice. (Get instructor approval for your topic)