



Sustainable Social Marketing Self-Assessment Tool

Social marketing organizations (SMOs) can conduct their own sustainability analysis using the Sustainability Continuum for Social Marketing. Because so many of the factors affecting sustainability are context-specific, sustainability assessments are more qualitative than quantitative. This tool facilitates the staff or stakeholders' analysis of an SMO to measure where it fits within the sustainability continuum and to set goals for strengthening sustainability along the continuum's dimensions. Any SMO can use the tool, regardless of where it currently fits within the continuum, and self-assessments can be conducted as often as needed. SMOs should conduct a self-assessment at least annually.

Each SMO should analyze the results of the self-assessment tool within the context of specific program goals. In general, however, the objective is to maximize the number of "Yes" answers for the "Yes/No" questions. For the open-ended questions, compare each answer with the indicators in the sustainability continuum to establish performance benchmarks.

I. TECHNICAL SUSTAINABILITY

a. Products	Yes	No
i. Is the SMO dependent on receiving donor-procured products?	<input type="checkbox"/>	<input type="checkbox"/>
ii. Can the SMO source quality products locally from the private or public sector to ensure product availability?	<input type="checkbox"/>	<input type="checkbox"/>
iii. Can the SMO procure its own products through open international tenders?	<input type="checkbox"/>	<input type="checkbox"/>
iv. Has the SMO developed distribution agreements with commercial partners or negotiated other partnerships with commercial partners to ensure product supply?	<input type="checkbox"/>	<input type="checkbox"/>
b. Price	Yes	No
i. How often does the SMO review prices for possible increases or decreases? _____		
ii. Does the SMO adjust prices for inflation?	<input type="checkbox"/>	<input type="checkbox"/>
iii. Does the SMO track differences between actual and suggested retail prices and adjust prices when the actual price exceeds the suggested one?	<input type="checkbox"/>	<input type="checkbox"/>



I. TECHNICAL SUSTAINABILITY *(continued)*

b. Price <i>(continued)</i>	Yes	No
iv. Has the SMO conducted willingness-to-pay surveys with its target groups?	<input type="checkbox"/>	<input type="checkbox"/>
v. If so, are prices increased when people are willing to pay significantly higher prices than the one being charged?	<input type="checkbox"/>	<input type="checkbox"/>
vi. Does the pricing policy reflect market-segmentation strategies?	<input type="checkbox"/>	<input type="checkbox"/>
vii. Does the recommended retail price for each target group fall within the range that each target group is willing to pay?	<input type="checkbox"/>	<input type="checkbox"/>
viii. What percentage is the unit price to the trade of the unit cost of goods sold?	_____ percent	

c. Promotion and Communication	Yes	No
i. What is the ratio of brand-specific advertising and promotion expenses to sales revenues from the brand? _____		
ii. What is the ratio of brand-specific advertising and promotion to generic behavior change communication? _____		
iii. Are commercial entities investing in branded communication for health products related to the SMO's objectives?	<input type="checkbox"/>	<input type="checkbox"/>
iv. Does the SMO have internally controlled, entrepreneurial sources of funding that subsidize generic behavior change communication?	<input type="checkbox"/>	<input type="checkbox"/>
v. Does the SMO have monitoring systems to ensure that target groups are exposed to branded and generic communication?	<input type="checkbox"/>	<input type="checkbox"/>
vi. Does the SMO use communication strategies that work through local institutions that can assume message dissemination beyond the life of a campaign?	<input type="checkbox"/>	<input type="checkbox"/>
vii. Has the majority of the target group acquired basic knowledge about the healthy behavior?	<input type="checkbox"/>	<input type="checkbox"/>
viii. Has the majority of the target group adopted the healthy behavior?	<input type="checkbox"/>	<input type="checkbox"/>

d. Distribution	Yes	No
i. What percentage of SMO products are distributed using the SMO's sales force?	_____ percent	
ii. What percentage of products sold require donor subsidies to reach end consumers?	_____ percent	

I. TECHNICAL SUSTAINABILITY *(continued)*

d. Distribution <i>(continued)</i>	Yes	No
iii. What is the ratio of cost per unit distributed to the unit cost of goods sold? _____		
iv. Is distribution targeted to high-risk groups receiving specific subsidies from a donor or other source of revenue?	<input type="checkbox"/>	<input type="checkbox"/>

II. FINANCIAL SUSTAINABILITY

	Yes	No
i. Does the SMO have a core business based on the social marketing of one or more products or services that can be sustained without donor support?	<input type="checkbox"/>	<input type="checkbox"/>
ii. What is the ratio of sales revenues to total costs? _____		
iii. What is the ratio of unit revenue per product sold to the unit cost of goods sold for each product in the SMO's range? _____		
iv. For distribution or communication activities that require donor subsidies, is the SMO able to separate funding requirements for each activity?	<input type="checkbox"/>	<input type="checkbox"/>
v. Are sustainable revenues diversified across a range of products and services?	<input type="checkbox"/>	<input type="checkbox"/>
vi. Are subsidized activities diversified across a range of donors?	<input type="checkbox"/>	<input type="checkbox"/>

III. ORGANIZATIONAL SUSTAINABILITY

a. Leadership	Yes	No
i. Can the staff and members of the governing body of the SMO articulate its mission and the vision?	<input type="checkbox"/>	<input type="checkbox"/>
ii. Is there a long-term planning process that builds on the organization's mission and includes stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>
iii. Does the SMO understand its market and the needs of its clients?	<input type="checkbox"/>	<input type="checkbox"/>

III. ORGANIZATIONAL SUSTAINABILITY *(continued)*

b. Management Capacity		Yes	No
i.	Does the SMO have financial systems capable of tracking and aggregating costs and revenues to facilitate management and planning decisions?	<input type="checkbox"/>	<input type="checkbox"/>
ii.	Does the SMO have financial and administrative systems that allow management to track the performance of each product line or business unit?	<input type="checkbox"/>	<input type="checkbox"/>
iii.	Does the SMO have personnel systems capable of recruiting, developing, and retaining qualified staff?	<input type="checkbox"/>	<input type="checkbox"/>
iv.	Are key management staff members employed by the SMO and based in its home country?	<input type="checkbox"/>	<input type="checkbox"/>

c. Governance		Yes	No
i.	Is the SMO a registered legal entity in its country of operation?	<input type="checkbox"/>	<input type="checkbox"/>
ii.	Does its legal status support a full range of commercial and social activities foreseen in the mission of the SMO?	<input type="checkbox"/>	<input type="checkbox"/>
iii.	Are the SMO's governance structures appropriate and effective?	<input type="checkbox"/>	<input type="checkbox"/>

IV. MARKET SUSTAINABILITY

		Yes	No
a.	Has the market been expanding in terms of the number of consumers, the level of sales, and the number of competing products?	<input type="checkbox"/>	<input type="checkbox"/>
b.	Is the commercial contribution to total consumption (including social marketing and public sector contributions) at least 40 percent of the total market?	<input type="checkbox"/>	<input type="checkbox"/>
c.	Does the market leader have a market share below 40 percent of the total market?	<input type="checkbox"/>	<input type="checkbox"/>
d.	Is there evidence of an increasing number of consumer segments or market niches that demand more sophisticated variants of the product?	<input type="checkbox"/>	<input type="checkbox"/>

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