Appendix 4a. BBF Recommendation Grading Survey Instructions

These instructions are intended to be used by the individuals developing the survey, including country directors and coordinators.

Introduction

Before beginning to develop the survey, you can use one of two options to create and distribute it to BBF committee members.

1. Google Forms and Excel Spreadsheet: an online survey that you edit and send via Google.
2. Word Forms and Excel Spreadsheet: to be sent via email or printed to distribute.

Once you have chosen which method you would like to use to distribute the survey, ensure that you have finalized all the recommendations using the appropriate template (Appendix 1 or your own).

Note: if there are less or more than 10 recommendations, additional steps in the Survey Management and Data Management stages will need to be taken within Option 1. Carefully follow the instructions for **MORE than 10 recommendations** or **LESS than 10 recommendations** if these situations pertain to your country.

A. Option 1. Google Forms and Excel Spreadsheet

SURVEY MANAGEMENT

This stage involves the following steps:
1. Access the survey template
2. Orient yourself to Google Forms
3. Revise the survey
4. Circulate

Survey Management Step 1. Access the survey template

1. Contact Katie Doucet (Katie.Doucet@yale.edu) to ask for access to the Google forms survey template (*Appendix 3: BBF Policy Recommendations Grading Survey*) for your country.
2. You will receive an invitation via email from Katie containing a link specific for the google form for your country.
3. Once you receive this link, click on it and you will be taken to your country specific survey template. **Please do not change the name of the survey.**

Note: When you click the link, if you receive an error that says "File Unavailable" or "Sorry there is a problem with this file, please reload", copy the link and paste it into a different browser to open the survey. For example, the browser Internet Explorer may not function well with the development and management of this survey; please try alternatives like Mozilla or Google Chrome as.

Survey Management Step 2. Orient Yourself to Google Forms

Overview of Google Forms

- **Auto-save:** Google auto-saves all changes made to the Google Form. This means that you do not need to select a "save" button before closing the survey; as long as you maintain a strong internet connection, last changes made will appear when signing back in to the Google Form.
- **Copy and paste:** Copying and pasting make it easy to duplicate sections of the survey.
    - **Copy:** Press and hold the "control" and "c" keys on your keyboard.
    - **Paste:** Press and hold the "control" and "v" keys on your keyboard.

There are several functions that will allow you to edit the survey:
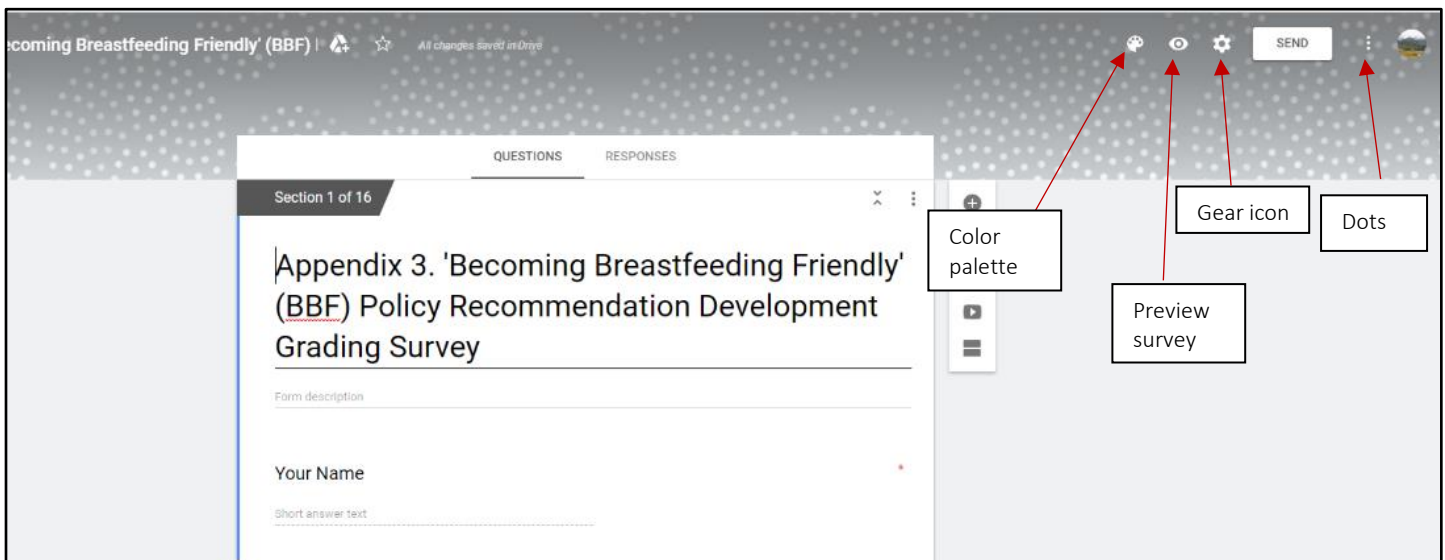
- **Gear icon:** Change survey settings by selecting the gear icon in the top right corner of the Google Form. You can change General settings and those related to survey presentation, and you can choose to make the survey a quiz. (Note: you do not want to make the survey a quiz for this exercise.)
- **Color palette:** Change the color scheme of the survey by using the "color palette" feature, by selecting the paint palette icon at the top right corner of the Google Forms program
- **Preview survey:** This feature allows you to view the survey before distributing it. Select the eyeball icon at the top right corner of the Google Forms program.
- **Dots:** Make other edits to the form by selecting the 3 vertical dots at the top right corner of the Google Forms program
  - **Useful features:** This feature allows you to "undo" an action previously done; make a copy of the survey; move the survey to the "trash" (i.e., get rid of the survey); print the survey; and add "collaborators" to the survey (i.e., add people who you would like to edit or otherwise access the data management side of the survey).
  - Other functionalities may be less useful for the purposes of this exercise.
- **Note:** For additional help, select the question mark at the bottom right corner of the Google Forms page marked "Help & Feedback". This button allows you to:
  - Take a tour of Google Forms to help orient you
  - Report a technical problem you are experiencing with the Form
  - Contact the Help Center
  - Revert back to "old Forms", an older version of Google Forms.
    - Note: it will likely be easier to stick with the current version.

Survey Management Step 3. Revise the survey

1. Click where you would like to edit or modify a section of the survey.
2. *You will be primarily changing the recommendation tables within the template.*
3. To change the tables under "Considerations when grading BBF Policy Recommendations", follow these steps:

   i.   Take a screenshot of each of your finalized recommendation tables or use the "Snipping Tool" on your PC.
   ii. Paste that image into a new word document. Ensure it is the size you need.
   iii. Save the image to your computer and follow the steps below for pasting it into the survey.

Hints: Computers may allow you to print your screen differently. Here are some options based on what you have:

- To take a "screenshot" on a PC computer, please perform one of the following functions (depending on your particular PC settings):
  - select the keys "Control" and "Print Screen". Then, move the cross that appears as your cursor across the section of the screen you would like to use.
  - select the Windows key and the print screen button to take a screenshot of the entire screen that appears on your computer. This screenshot will auto-save in a default folder called "Pictures". You can find it on your PC here: C:\Users\[user]\Pictures\Screenshots.

- To find the Snipping Tool, type "Snipping Tool" in the bottom search bar on your PC. Once opened, select "Mode", choose the kind of "snip" you want, and, using your cursor, select the area of the screen you want to copy.
- To take a "screenshot" on a Mac computer, select the keys "Command", "Shift", and "4". Then, move the cross that appears as your cursor across the section of the screen you would like to use. The screenshot will auto-save on your Desktop.
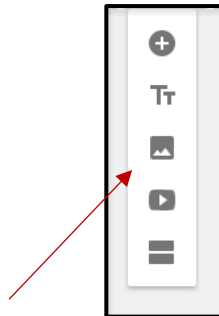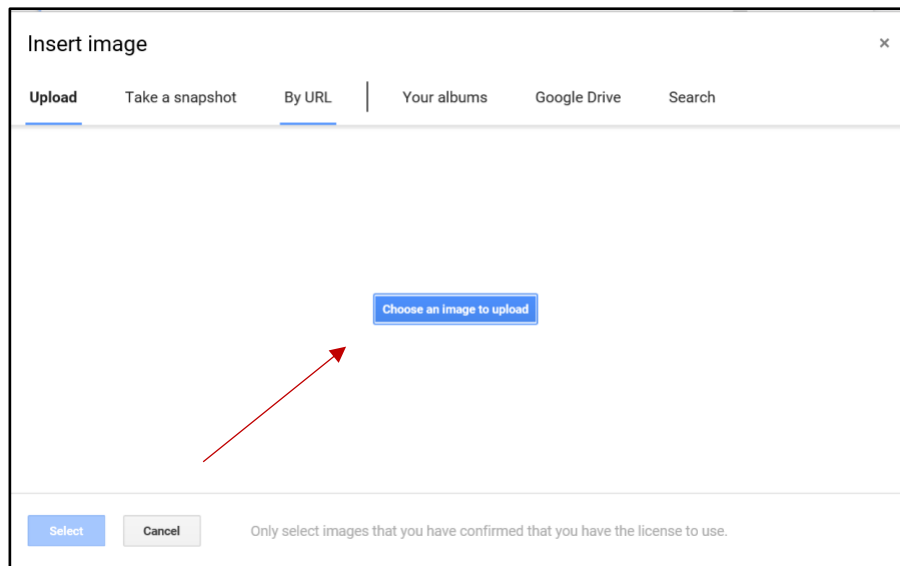

https://www2.owens.edu/faq/entry/67/

https://recoverit.wondershare.com/mac-recovery/capture-screenshot-on-mac.html

- In the survey template, place your cursor over the blank table and select this icon to "add image":


- The following screen will populate:

What populates after selecting the "add image" icon

- This Click on the "Choose and image to upload" button and select the appropriate table from your desktop to add to the survey.
- Delete the blank tables by selecting the table and then clicking on the trash can icon in the top right corner.
- Repeat this process as you replace each blank table with your finalized recommendation tables.
- Make additional changes to the survey as needed by clicking on the icons to the right of the screen.

LESS than 10 recommendations

If your country has less than 10 recommendations, you can delete any sections of the survey that are not needed. For instance, if your committee has 8 recommendations, you should delete sections 12 and 13 of the survey, which correspond to recommendations 9 and 10. To do this, go to the relevant section(s), click on the 3 vertical dots and select "delete section".
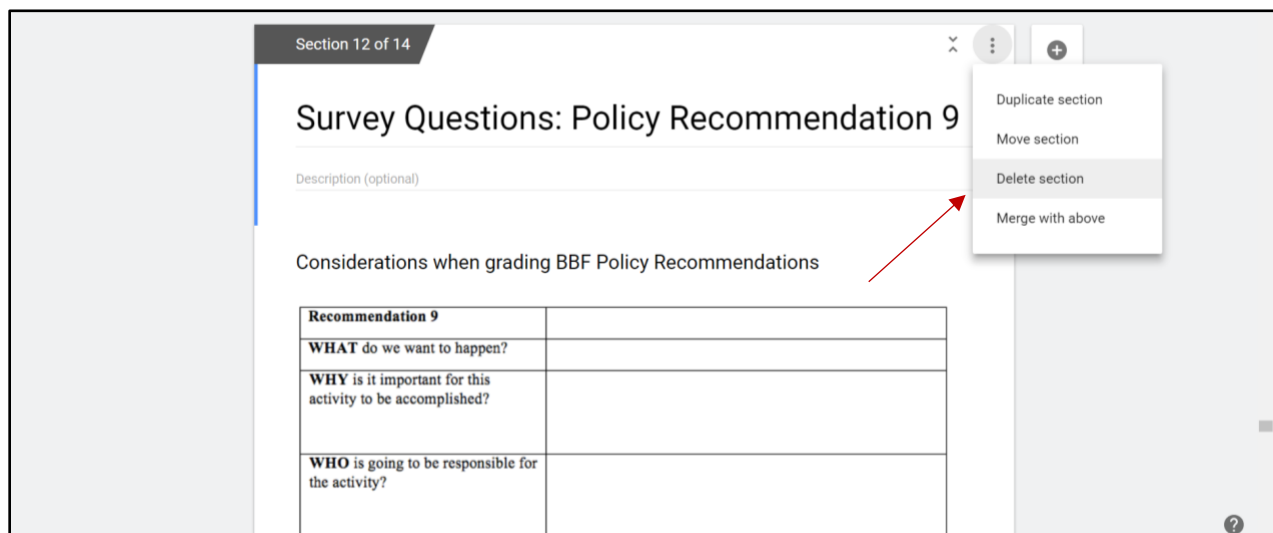
MORE than 10 recommendations

- If you have more than 10 recommendations, you will need to copy and paste from the 10th recommendation.
- Go to the 10th recommendation.
- To copy, select the three vertical dots to the top right of the page:
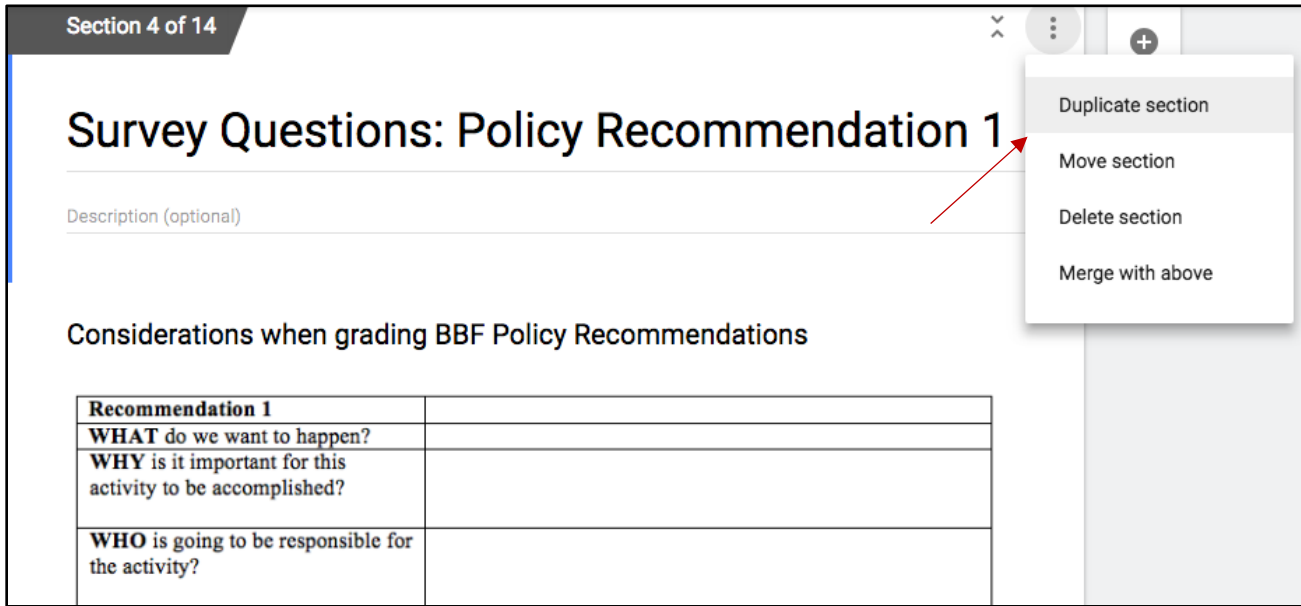
- Add as many recommendations above 10 that are needed by selecting "Duplicate section" in drop-down menu.
- Edit to reflect the appropriate recommendation.

Survey Management Step 4. Circulate the survey

Send the survey to the participants by clicking on the "Send" button at the top right corner of the Google Form and entering their email addresses:

Note: You may use the survey invitation to provide background to the committee members and remind them to complete the survey only once.

DATA MANAGEMENT

Before you begin the manage the data, you should keep in mind couple of important notes:

1. Although no special permissions are required to access the survey or its responses (i.e., Appendix 3 and Appendix 4, respectively) note that both BBF country institutions and all country respondents must have access to Google platforms in order to administer and fill out the survey, respectively. This means that, while a Google account is not required to take the survey, respondents will need to be sure that they are able to access Google from either work or home (i.e., that Google is not blocked).

2. Survey respondents who have limited time to answer each of the survey questions may feel inclined to start the survey and finish answering its questions later. However, Google does not currently support a start-save-finish later function. This means that respondents will need to complete and submit the survey before responses are saved. Of course, the time spent taking the survey will depend on the length of the survey (i.e., how many recommendations are included). The country director or coordinator should ensure that all respondents are able to take and finish the survey at one time.

Next, after all participants have filled out the survey, it is time to organize the responses, and generate and interpret the grades. This stage involves the following steps:

1. Find the Responses
2. Transfer the data to Excel
3. Interpret the grades

Data Management Step 1. Find the responses on Google Forms

Go back to the Google survey link you used to edit the survey, and select the "Responses" tab:

You will see both a summary of responses *and the* individual responses. You can view *all the* participant responses in Google sheet format by clicking the green Google Sheets icon on the right-hand side of the screen:
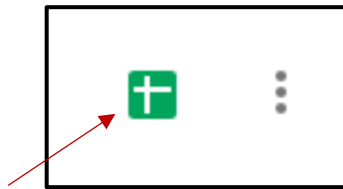
A Google Sheets document will then open in a new tab or window entitled *Appendix 4. Recommendation Grade Calculator*. Alternatively, you can download responses by selecting the 3 dots, and click "download responses".

Note: In order to retain the validity of the data, please do not modify the data here; you should only use this document to copy and paste the data into the Excel spreadsheets (*Appendix 4: Recommendation Grade Calculator*).

Data Management Step 2. Transfer the data to Excel

Open the Excel spreadsheet entitled *Appendix 4: Recommendation Grade Calculator_1-10*.

Copy and paste **only** the respondents' answers (the "Form Responses" tab in the Google Sheet) into the first tab in Appendix 4 (also called "Form Responses"). Only the tab labeled "Form Responses" is unprotected and editable.

The additional tabs in the Excel sheet should auto-populate with the inserted data. Make sure this has happened before continuing.

The tabs within the Appendix 4 spreadsheet, in order from left to right:

- Form Responses (respondent data is copied and pasted)
- Summary (average of each criterion and the overall grade is calculated for each recommendation)
- Master (houses all data, for all Recommendations)
- Each recommendation (the number of tabs will depend on how many recommendations were surveyed)

| Form Responses | 🔒 Summary | 🔒 Master | 🔒 Recommendation 1 | 🔒 Recommendation 2 | 🔒 Recommendation 3 | 🔒 Recommendation 4 | 🔒 Recommendation 5 | 🔒 Recommendation 6 |

Note: To copy and paste the "Form Responses" sheet only in Google Sheets, click on the actual number of the rows you wish to copy and the entire rows will be highlighted. Go to the "edit" tab at the top of the screen and select "copy". In the Excel spreadsheet, highlight Row 2 by placing your cursor in the cell with the number "2" in it, go to the "edit" tab and select "paste" within the first sheet of the Excel spreadsheet. Alternatively, you can right click and press "paste".
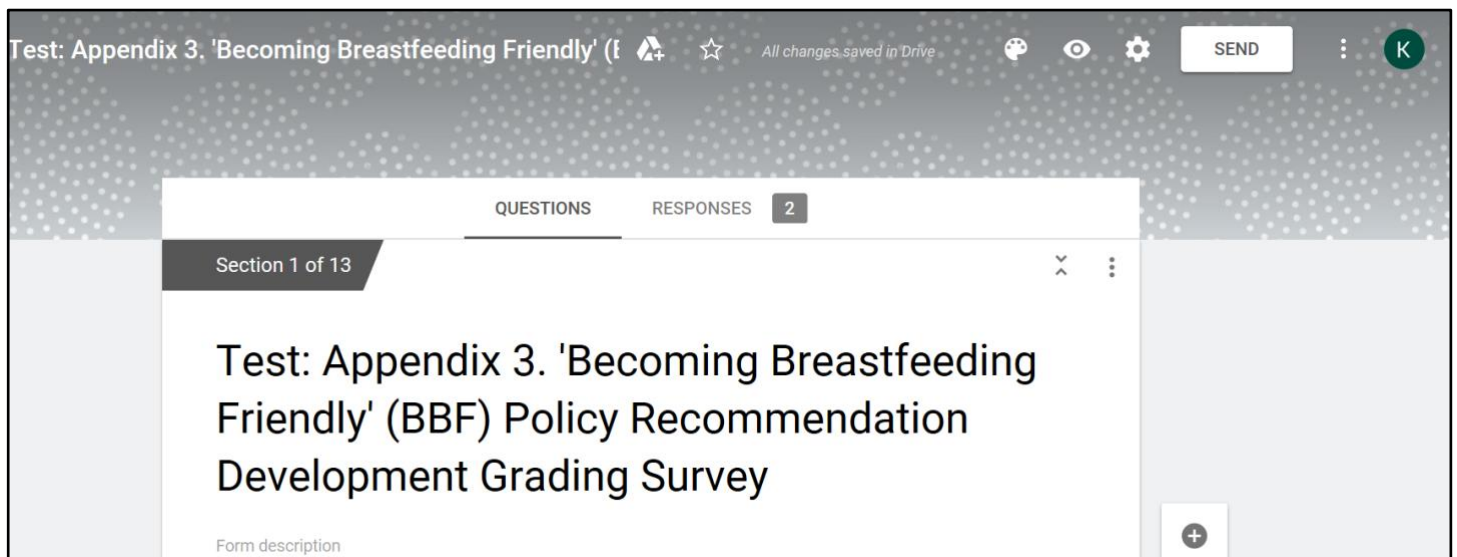
Note: When copying and pasting data, it is important to check the data, ensuring that the columns (i.e., survey questions) and rows (i.e., Recommendations) in the Google Form align with those in the Excel spreadsheet. This is critical for the formulas to work.

LESS than 10 recommendations

If your country has less than 10 recommendations, (e.g., if your country has 7 recommendations), respondents' answers should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_1-10* only. The additional 3 tabs (i.e., tabs for Recommendations 8, 9, and 10) can be left blank; the blank cells will not factor into the criterion or summary grades.

MORE than 10 recommendations

This process should be repeated for as many recommendations as are needed by each country. For example, if a country has 20 recommendations, then respondents' answers should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_1-10*; the second 10 recommendations should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_11-20.* If a country has 15 recommendations, then *Appendix 4: Recommendation Grade Calculator_1-10* plus the first 5 tabs only in *Appendix 4: Recommendation Grade Calculator_11-20* will be filled.

Note: Please double check that the data being copied is pasted in the correct order (i.e., that the data corresponding to each question corresponds to the intended and appropriate questions for each particular recommendation.

Where there are more than 10 recommendations, additional Excel spreadsheets are available:

- *Appendix 4: Recommendation Grade Calculator_1-10* for the *first* 10 recommendations to be copied and pasted from Google Sheets as per the instructions above in Step 2.
- *Appendix 4: Recommendation Grade Calculator_11-20* for the *next* 10 recommendations to be copied and pasted according to the instructions as per the instructions above in Step 2.
- *Appendix 4: Recommendation Grade Calculator_21-30* for the *final* 10 recommendations to be copied and pasted according to the instructions as per the instructions above in Step 2.
- *Appendix 4 Recommendation Grade Calculator_UNPROTECTED* allows for modification if you would like to use them and their associated formulas in the future; **however, as mentioned, please only use it to copy and paste additional tabs for additional recommendations if your country has more than 30 recommendations.**

These multiple excel files were created to reduce the margin of error that may occur when large amounts of data are copied and pasted.

Note: Where additional questions are added to the survey, please ensure that you follow the format of questions in Appendix 4, i.e., each recommendation should include the 3 questions relevant to each of the 3 criteria (i.e., Effectiveness, Affordability, and Feasibility) for a total of 9 questions for each recommendation). Changing the content of the survey (i.e., changing the wording of the questions or adding additional questions per criterion) will negatively affect the integrity of the survey, responses, and analysis.

Data Management Step 3. Interpretation of Grades

In order to calculate the average grade from each of the three criteria – Effectiveness, Affordability, Feasibility-, the answers correspond to numerical values embedded in the Excel spreadsheet formulas:

> "Yes" = 1
> "No" = 0
> "Cannot decide" = 0.5
> "No answer" = no value

"No answer" responses are not recorded as an answer and do not contribute to the denominator when **criterion grades** and **recommendation grades** are calculated.

The **criterion grades** presented in the Appendix 5 PowerPoint are calculated in the Excel spreadsheet by averaging all grades for each criterion in the "Summary" tab. Grades range from 0 to 1: A grade of "1" means complete agreement that that recommendation meets the given criteria.

The **recommendation grades** in Appendix 5 are calculated in the Excel spreadsheet by averaging the 3 criteria grades in the "Summary" tab. The grades range from 0 to 1: averages closer to "1" represent stronger grades based on the three criteria, and averages closer to "0" represent weaker recommendations with respect to the given criteria.

Note: Each Excel document averages the 3 criterion grades for each recommendation; however, if countries have more than 10 recommendations, the recommendation grades across each Excel spreadsheet will need to be averaged with one another. In other words, to calculate recommendation grades for each set of 10 recommendations from each Excel spreadsheet, each summary recommendation grade across each Excel document needs to be averaged with one another other; this applies only if your country has included more than 10 recommendations in your survey.

Option 2. Word Document and Excel Spreadsheet

Please follow the following steps in order to set up and circulate *Appendix 3: BBF Policy Recommendations Grading Survey*.

SURVEY MANAGEMENT

This stage involves the following steps:

1. Access and revise survey template
2. Circulate

Survey Management Step 1. Access and revise the survey template

Open the Microsoft Word document entitled *Appendix 3: BBF Policy Recommendations Grading Survey*.

Click in the spaces to edit the survey. Change the tables under "Considerations when grading BBF Policy Recommendations" according to your country's policy recommendations by either manually entering the information from your finalized recommendation tables or copying and pasting your tables.

Note: Make additional changes to the survey as are needed by your country and delete any blank tables. **Please do not change the name of the survey.**

Survey Questions: Policy Recommendation 1	
Considerations when grading BBF Policy Recommendations	
Recommendation	
WHAT do we want to happen?	
WHY is it important for this activity to be accomplished?	
WHO is going to be responsible for the activity?	
WHEN should this activity be completed by?	
HOW will these activities get done?	
HAVE similar actions been effective in enabling the breastfeeding environment in other contexts? **(Provide examples and use BBF case studies.)**	

LESS than 10 recommendations

If your country has less than 10 recommendations, you can delete any sections of the survey that are not needed by deleting the questions that are not needed from the Microsoft Word version of the survey.

MORE than 10 recommendations

If you have more than 10 recommendations, you will need to copy and paste from the 10th recommendation. Using the same instructions for copy and paste described earlier in this document, copy and paste the 9 questions – 3 for each criterion (i.e., Effectiveness, Affordability, Feasibility) – and add them beneath each new recommendation that you are adding to your survey.

Survey Management Step 2. Circulate the survey

Send the survey to the participants, either in person or via email, to be filled out manually or electronically.

Note: You may use the survey invitation to provide background to the committee members and remind them to complete the survey only once.

DATA MANAGEMENT

After all participants have filled out the survey, it is time to organize the responses, and generate and interpret the grades. This stage involves the following steps:
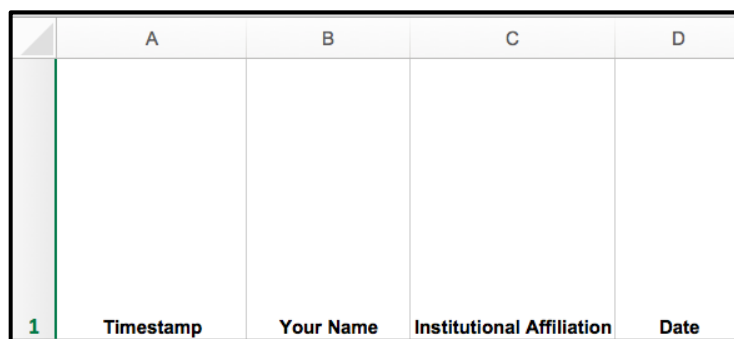
1. Transfer the data to Excel
2. Interpret the grades

Data Management Step 1. Transfer the data to Excel

Alternative 1. Use Appendix 4 (Recommendation Grade Calculators)

Open the Microsoft Excel spreadsheet entitled *Appendix 4: Recommendation Grade Calculator_1-10* and manually enter or copy and paste the respondents' answers into the first tab ("Form Responses"). Only this tab is unprotected and editable.

Enter the time at which the participant took the survey (Column A), their name (Column B), their institutional affiliation (Column C), and the date (Column D):

Then, enter their answers into each of the corresponding cells (i.e., "yes", "no", "cannot decide", or "no answer"). Repeat this for each recommendation.

Rec 1 - 1.A. Decision makers are highly concerned with EFFECTIVENESS. Is there high-quality evidence and knowledge of this recommendation being effective (i.e. having an impact) from other contexts?	Rec 1 - 1.B. EFFECTIVENESS: Is the evidence for this recommendation translatable to your context?	Rec 1 - 1.C. EFFECTIVENESS: Is this recommendation scalable?
Yes	Yes	Yes
Yes	Yes	Yes
Yes	Yes	Yes

The additional tabs in the Excel sheet should auto-populate with the inserted data. Make sure this has happened before continuing.

The tabs within the Appendix 4 spreadsheet, in order from left to right:
- Form Responses (respondent data is copied and pasted)
- Summary (average of each criterion and the overall grade is calculated for each recommendation)
- Master (houses all data, for all Recommendations)
- Each recommendation (the number of tabs will depend on how many recommendations were surveyed)

| Form Responses | 🔒 Summary | 🔒 Master | 🔒 Recommendation 1 | 🔒 Recommendation 2 | 🔒 Recommendation 3 | 🔒 Recommendation 4 | 🔒 Recommendation 5 | 🔒 Recommendation 6 |

LESS than 10 recommendations

If your country has less than 10 recommendations, (e.g., if your country has 7 recommendations), respondents' answers should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_1-10* only. The additional 3 tabs (i.e., tabs for Recommendations 8, 9, and 10) can be left blank; the blank cells will not factor into the criterion or summary grades.

MORE than 10 recommendations

This process should be repeated for as many recommendations as are needed by each country. For example, if a country has 20 recommendations, then respondents' answers should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_1-10*; the second 10 recommendations should be manually entered or copied and pasted into the first tab ("Form Responses") in *Appendix 4: Recommendation Grade Calculator_11-20.* If a country has 15 recommendations, then *Appendix 4: Recommendation Grade Calculator_1-10* plus the first 5 tabs only in *Appendix 4: Recommendation Grade Calculator_11-20* will be filled.

Note: Please double check that the data being copied is pasted in the correct order (i.e., that the data corresponding to each question corresponds to the intended and appropriate questions for each particular recommendation).

Where there are more than 10 recommendations, additional Excel spreadsheets are available. Please see below:

- *Appendix 4: Recommendation Grade Calculator_1-10* for the first 10 recommendations to be copied and pasted from Google Sheets as per the instructions above
- *Appendix 4: Recommendation Grade Calculator_11-20* for the next 10 recommendations to be copied and pasted according to the instructions as per the instructions above
- *Appendix 4: Recommendation Grade Calculator_21-30* for the final 10 recommendations to be copied and pasted according to the instructions as per the instructions above
- *Appendix 4: Recommendation Grade Calculator_UNPROTECTED* allows for modification if you would like to use them and their associated formulas in the future; **however, as mentioned, please only use it to copy and paste additional tabs for additional recommendations if your country has more than 30 recommendations.**

These multiple Excel files were created to reduce the margin of error that may occur when large amounts of data are copied and pasted.

Note: Where additional questions are added to the survey, please ensure that you follow the format of questions in Appendix 4, i.e., each recommendation should include the 3 questions relevant to each of the 3 criteria (i.e., Effectiveness, Affordability, and Feasibility) for a total of 9 questions for each recommendation). Changing the content of the survey (i.e., changing the wording of the questions or adding additional questions per criterion) will negatively affect the integrity of the survey, responses, and analysis.

Note: When copying and pasting data, it is important to check the data, ensuring that the columns (i.e., survey questions) and rows (i.e., Recommendations) in the Google Form align with those in the Excel spreadsheet. This is critical for the formulas to work.

Alternative 2. Use Appendix 4b (Summary Grade Calculators)

Note: This option should be used in countries where the recommendation development and prioritization surveys will be completed in person during the 4th meeting.

Open the Microsoft Excel spreadsheet entitled *Appendix 4b: Summary Grade Calculator_1-10.* After each question is answered by all committee members filling out the survey, tally the number of responses received for each question that correspond to each recommendation. Then, follow the instructions written at the top of the spreadsheet (in purple):

Instructions: This sheet can summarize all committee member responses to the Recommendation Grading Survey. This sheet is organized with the 9 survey questions listed in column B, and the 4 response options for each recommendation across columns.
1) Start by filling in each recommendation across row 3.
2) As you can see, each recommendation has 6 corresponding columns (e.g. D through I correspond to Recommendation 1). **Only the dark and light yellow cells in this sheet should be edited.** The other cells are calculations needed to calculate the Summary sheet. Nothing should be edited on the Summary sheet.
3) For each questions 1A-3C, fill in the number of committee members who responded "yes", "no", "cannot answer" and "do not know" for each recommendation.
4) Repeat step 3 for all recommendations.

LESS than 10 recommendations

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If your country has less than 10 recommendations, (e.g., if your country has 7 recommendations), respondents' answers should be manually entered or copied and pasted into the first tab ("Scoring") in *Appendix 4b: Summary Grade Calculator_1-10* only. The additional 3 tabs (i.e., tabs for Recommendations 8, 9, and 10) can be left blank; the blank cells will not factor into the criterion or summary grades.

MORE than 10 recommendations

This process should be repeated for as many recommendations as are needed by each country. For example, if a country has 20 recommendations, then respondents' answers should be manually entered or copied and pasted into the first tab ("Scoring") in *Appendix 4b: Summary Grade Calculator_1-10*; the second 10 recommendations should be manually entered or copied and pasted into the first tab ("Scoring") in *Appendix 4: Summary Grade Calculator_11-20.* If a country has 15 recommendations, then *Appendix 4b: Summary Grade Calculator_1-10* plus the first 5 tabs only in *Appendix 4b: Summary Grade Calculator_11-20* will be filled.

Note: Please double check that the data being copied is pasted in the correct order (i.e., that the data corresponding to each question corresponds to the intended and appropriate questions for each particular recommendation).

Where there are more than 10 recommendations, additional Excel spreadsheets are available. Please see below:

- *Appendix b4: Summary Grade Calculator_1-10* for the first 10 recommendations to be copied and pasted from Google Sheets as per the instructions above
- *Appendix 4b: Summary Grade Calculator_11-20* for the next 10 recommendations to be copied and pasted according to the instructions as per the instructions above
- *Appendix 4b: Summary Grade Calculator_21-30* for the final 10 recommendations to be copied and pasted according to the instructions as per the instructions above
- *Appendix 4b: Summary Grade Calculator_unprotected* allows for modification if you would like to use this tool and its associated formulas in the future; **however, please only use it to copy and paste additional tabs for additional recommendations if your country has more than 30 recommendations.**

Data Management Step 2. Interpret the grades

In order to calculate the average grade (i.e., criterion grade) from each of the three criteria – Effectiveness, Affordability, Feasibility-, the answers correspond to numerical values embedded in the Excel spreadsheet formulas:

> "Yes" = 1
> "No" = 0
> "Cannot decide" = 0.5
> "No answer" = no value

"No answer" responses are not recorded as an answer and so do not contribute to the denominator when **criterion grades** and summary **recommendation grades** are calculated.

The **criterion grades** presented in the Appendix 5 PowerPoint document are calculated in the Excel spreadsheet by averaging all grades for each criterion in the "Summary" tab. Grades range from 0 to 1: A grade of "1" means complete agreement that that recommendation meets the given criteria.

The **recommendation grades** in Appendix 5 are calculated in the Excel spreadsheet by averaging the 3 criteria grades in the "Summary" tab. The grades range from 0 to 1: averages closer to "1" represent stronger grades based on the three criteria, and averages closer to "0" represent weaker recommendations with respect to the given criteria.

Note: Each Excel document averages the 3 criterion grades for each recommendation; however, if countries have more than 10 recommendations, the recommendation grades across each Excel spreadsheet will need to be averaged with one another. In other words, to calculate recommendation grades for each set of 10 recommendations from each Excel spreadsheet, each summary recommendation grade across each Excel document needs to be averaged with one another other; this applies only if your country has included more than 10 recommendations in your survey.