Getting Connected…

- **Dial In (best connection):**
  - Dial: 866.775.0802; Participant Code: *3630#
  - Make sure your speakers are **off** or there will be an echo.
  - To merge your name with your phone number on the list:
    - Enter token number found in “Join Audio Conference” pop up box. The token ID can also be viewed within the webinar by clicking on the “***i***” icon at the top right-hand corner.
    - Click the drop down menu at the top right of the attendees pod and select "edit my information" then enter your name and phone number
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  - Make sure your computer microphone and speakers are **on.**

Community-Based Social Marketing

SSDN Education to Execution Workshop Series

Webinar #1: Selecting and Prioritizing Behaviors

September 8, 2015

If you are using the phone to dial-in, be sure that your computer mic/speakers are on mute. **This webinar will be recorded.**

action research

Research • Social Marketing • Results

Agenda

Introductions (10 min)

- Announcements
- Name, City/County

Background (5 min)

- Webinar Series Overview
- Process Overview

Behavior Selection (30 min)

- Process
- Application

Introduce Tools (15 min)

- Worksheets/Spreadsheets
- Data Collection Tools

Q&A (30 min)

- Behaviors/Data Sources
- Challenges/Concerns

Introductions

Action Research: Intro to Speakers

Call Participants: Name, City/County

changing behavior

for the public good by applying marketing and social science research to outreach programs that promote clean, healthy, + sustainable communities.

clean	healthy	sustainable
community	workplace	environment
research	implement	evaluate

wide range of behavior change experience

waste + recycling

transportation

energy

water

health

conservation

agriculture

pollution prevention

webinar speakers

Jennifer Tabanico
President & Owner

Lori Brown Large
Director of Research Operations

Background

Webinar Series Overview

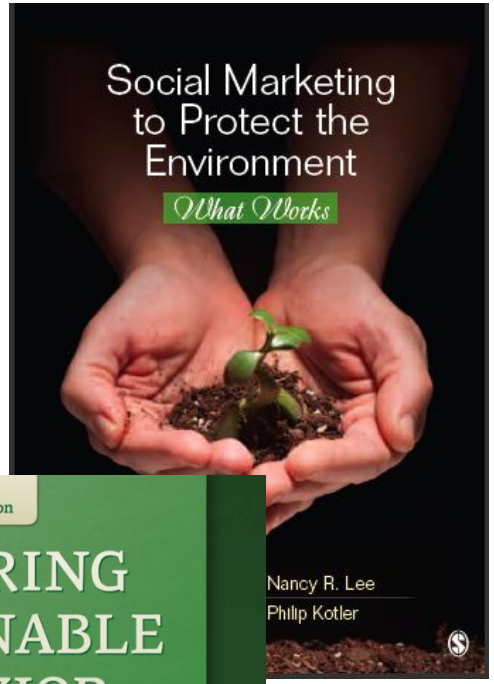
Process Overview

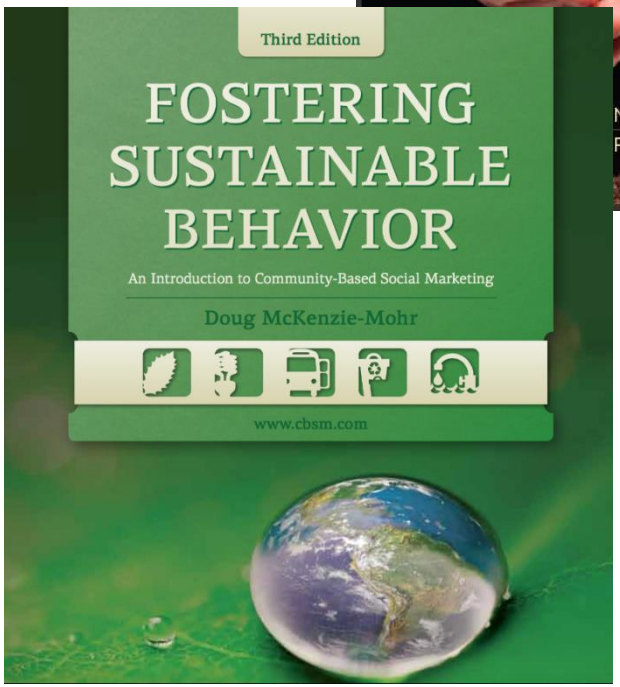
Webinar Series Overview

- **Selecting and Prioritizing Behaviors**
  - *Training and Tools*
- **Conducting Barrier and Benefit Research**
  - *Methods, Best Practices, Instruments, Resources*
- **Strategy and Message Design**
  - *Social Science, Matching Tools, Branding/Messaging*
- **Pilot Testing and Evaluation**
  - *Identifying Metrics, Design, Analysis, ROI*
- **Troubleshooting, Lessons Learned, Scaling Up**
  - *Discussion*

Background

- Fostering Sustainable Behavior
  - *Doug McKenzie-Mohr*
- Case Studies
  - *www.cbsm.com*
  - *“What Works”*
- USDN Turnkey Strategies
  - *Cold Water Wash*
  - *Computer Shutdown*





Community-Based Social Marketing

- origins in 100 years of social science
  - psychology, sociology, anthropology, etc.
- community-based
  - delivered at local-level
- removes barriers to action
  - motivational and structural
- behavior-based
  - outcomes (behavior change) not outputs (# of impressions)

Community-Based Social Marketing

McKenzie-Mohr, D. (1999, 2011). Fostering sustainable behavior. Canada: New Society Publishers. See also www.cbsm.com

Community-Based Social Marketing

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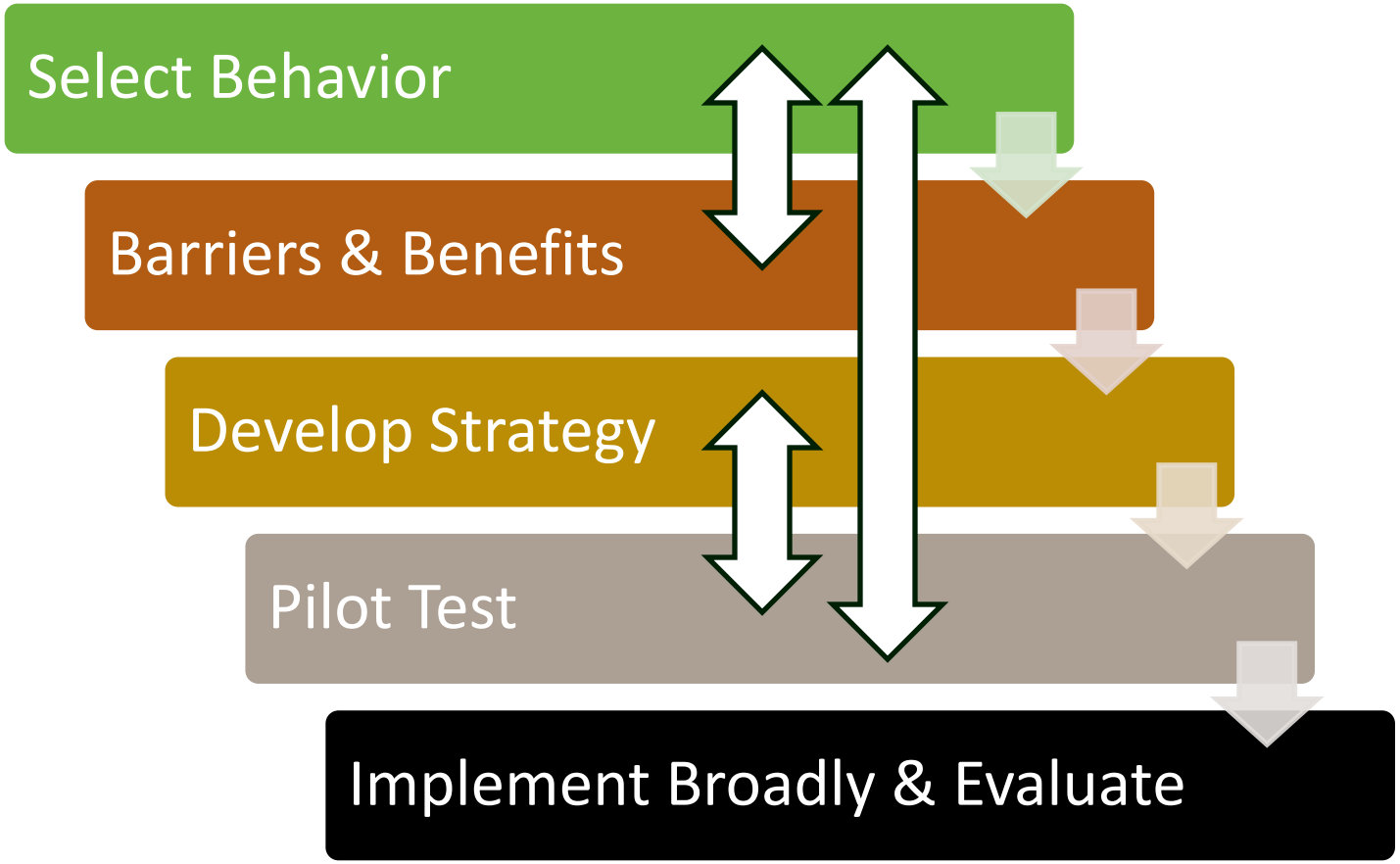
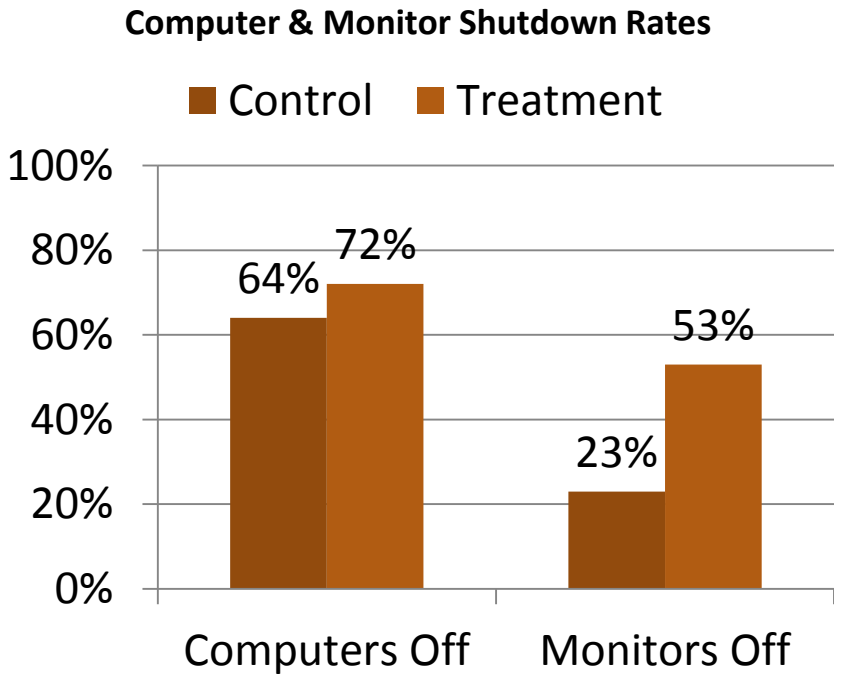
Community-Based Social Marketing



changing behavior

Urban Sustainability Directors Network

turn off computers and monitors at the end of the workday

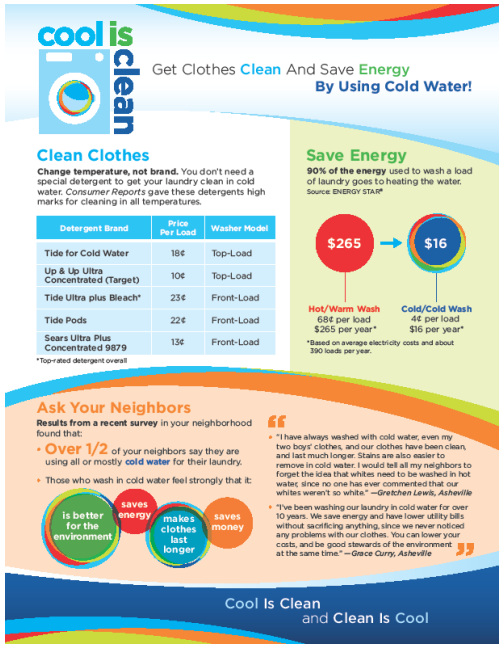


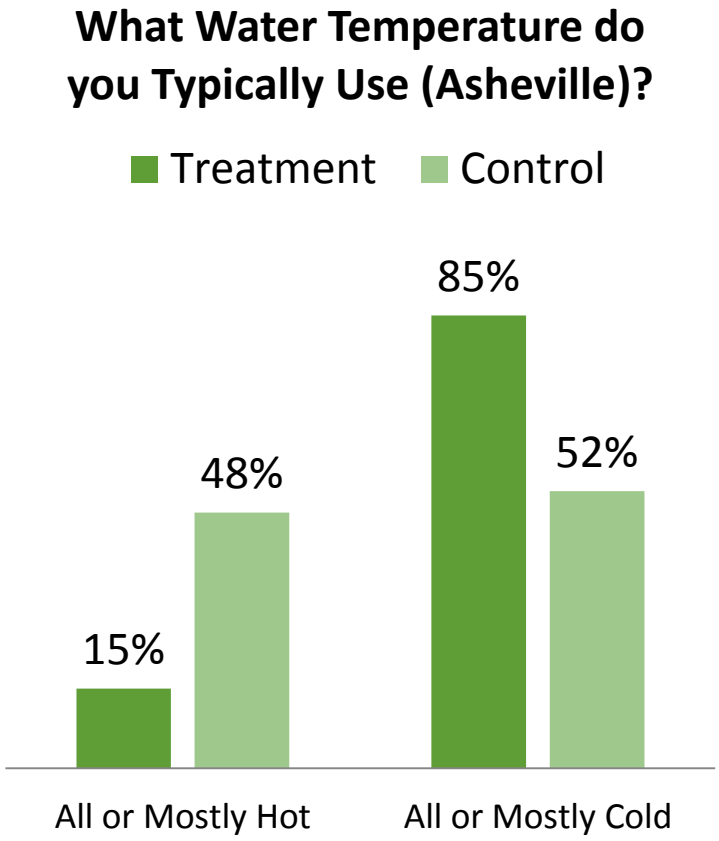
Santa Clara County, CA; Columbia, MO; Frederick County, MD

changing behavior

Urban Sustainability Directors Network

wash clothes in cold water





Asheville, NC; Tucson, AZ; Berkeley, CA

changing behavior

City of Fort Worth, Texas

residential recycling

- Waste audits (N=415)
  - Mixed paper largest opportunity
- In-person surveys (N=261)
  - Barriers varied by material type
- Strategy
  - Privacy concerns
  - Knowledge (e.g., shiny paper, windows)

Behavior Selection

Process

Application

CBSM Step 1: Selecting Behaviors

- Strategic selection
  - Desired outcome?
  - Sectors? Audiences?
  - Behavior linked to outcome?

- Informed choices
  - Hunches often disconfirmed
  - Confirmation bias
  - Technical and survey data

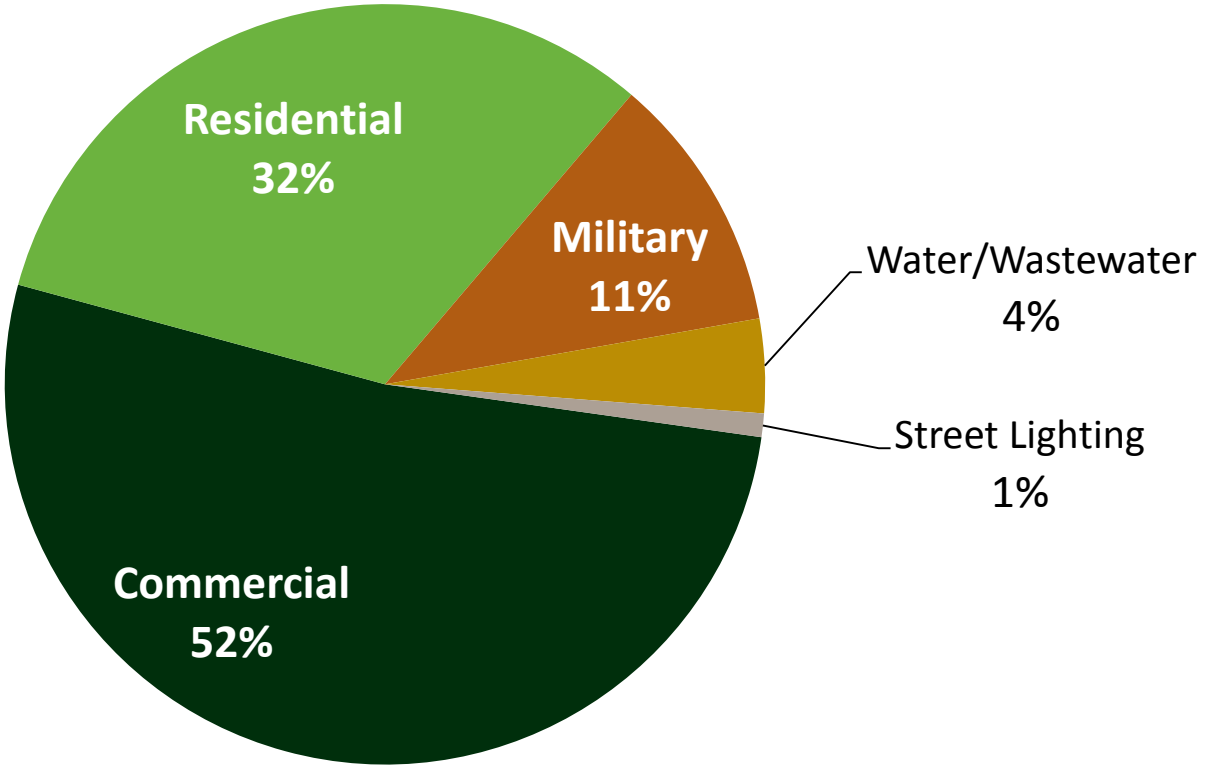
#1: Define Your Outcome(s)

- **Outcomes**
  - kWh
  - Gallons of water
  - Tons of waste
  - Gallons of used oil

- **Outputs**
  - Web hits
  - Page likes
  - Event participation

#2: Decide What Sector to Target

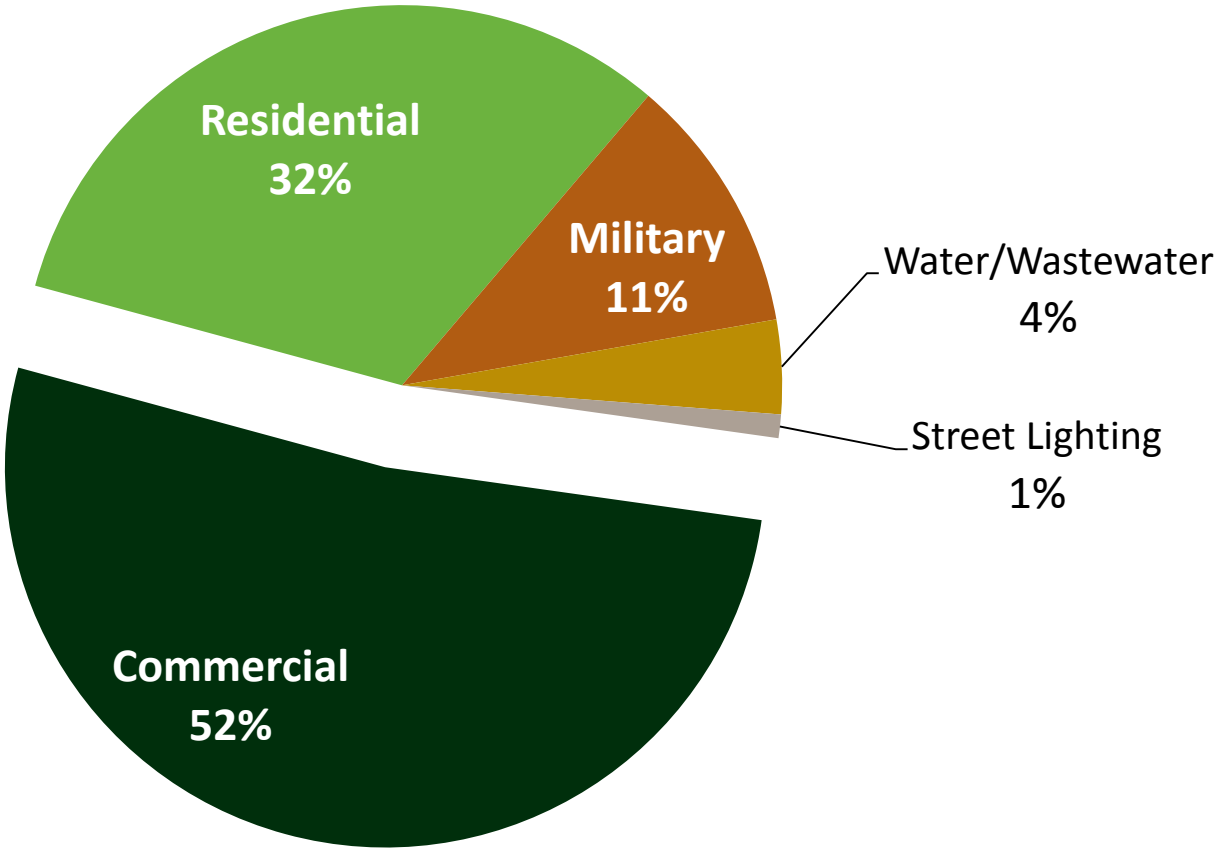
Hawaii Statewide Electricity Use by Sector, 2012



EnerNOC 2014

#2: Decide What Sector to Target

Hawaii Statewide Electricity Use by Sector, 2012



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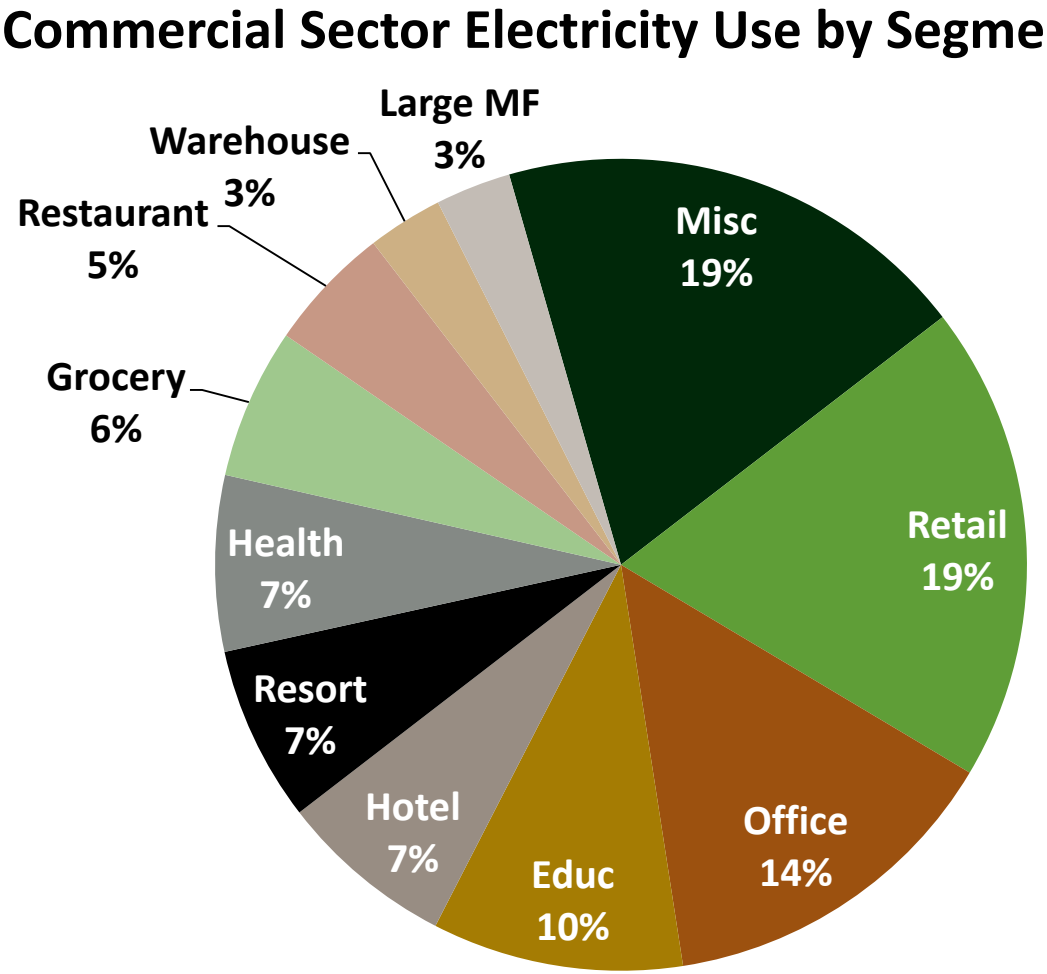
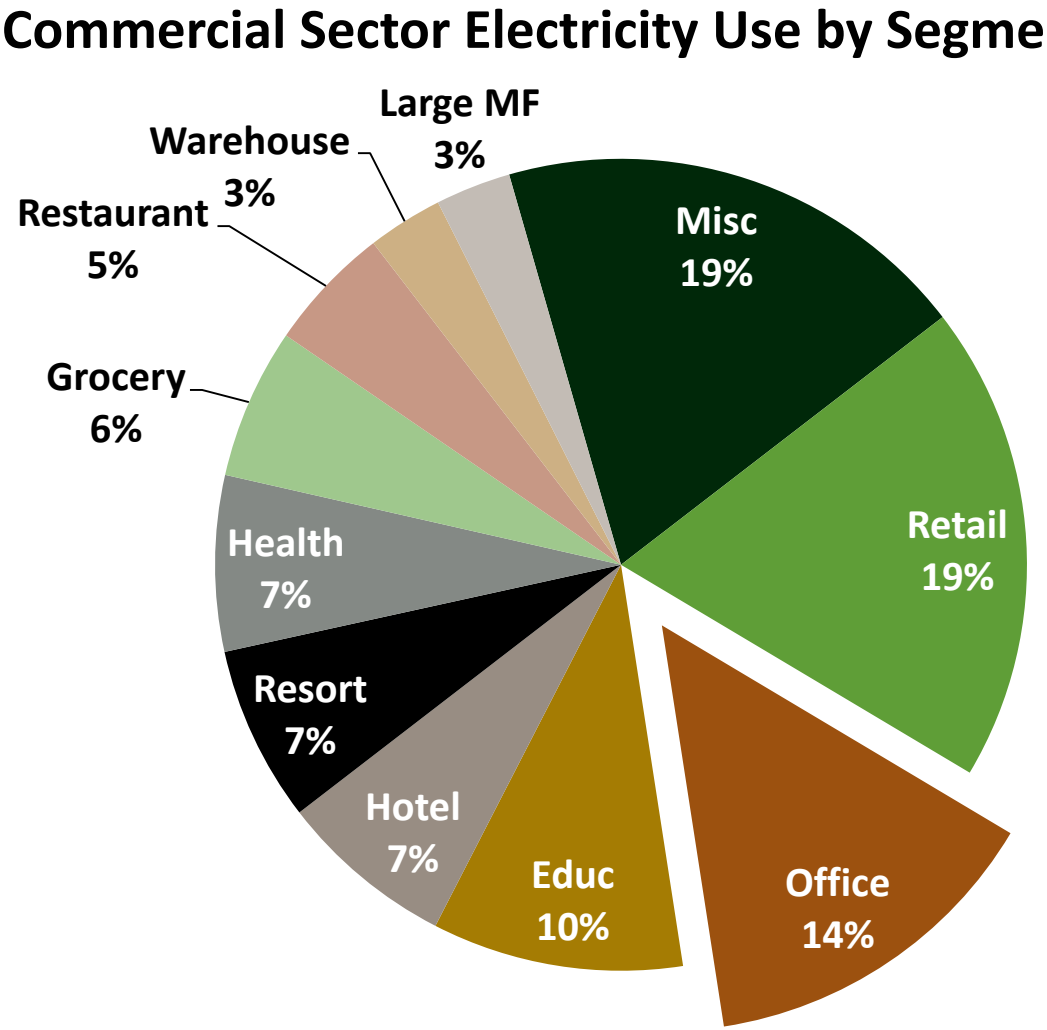
#3: Decide Which Usage Categories to Target



EnerNOC 2014

#3: Decide Which Usage Categories to Target



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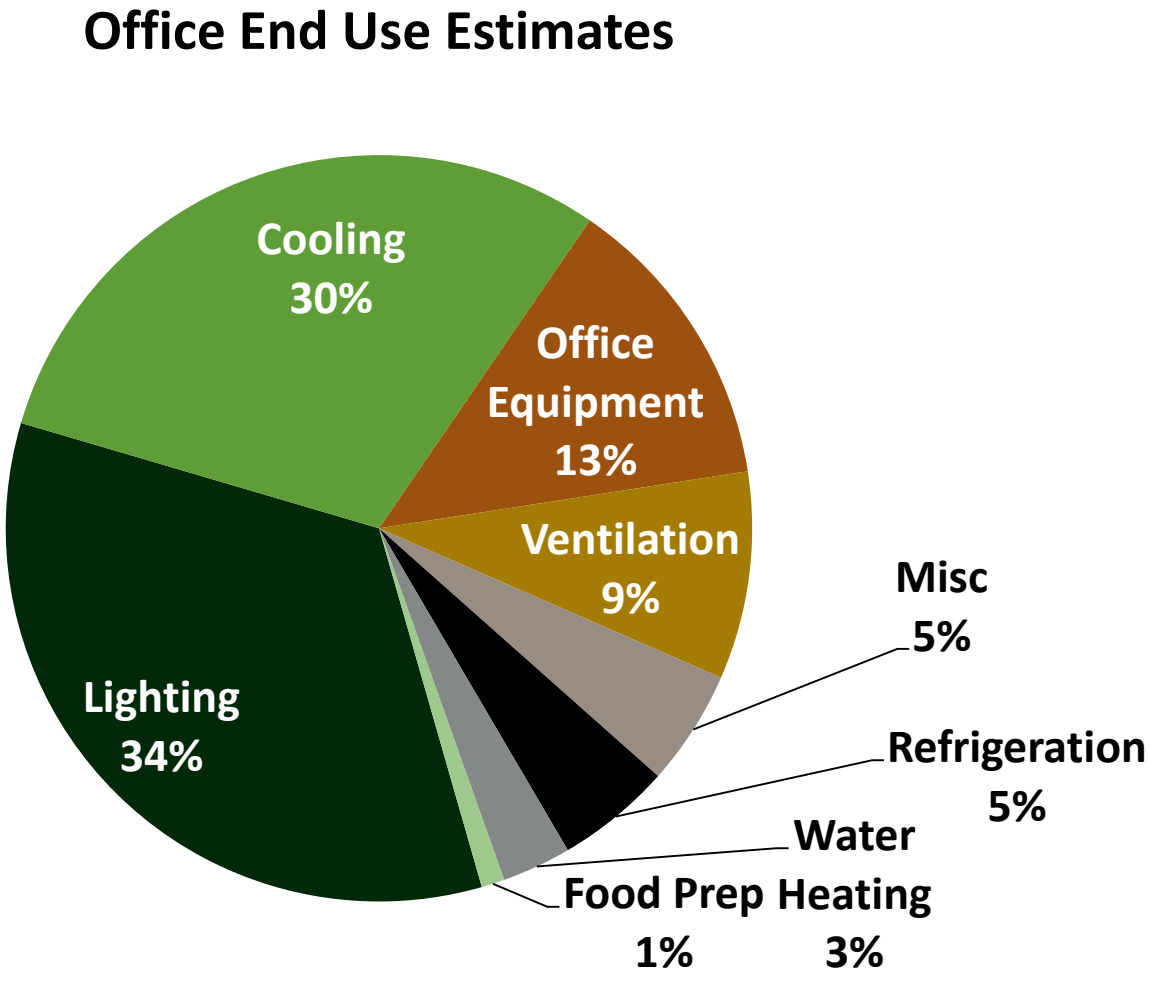
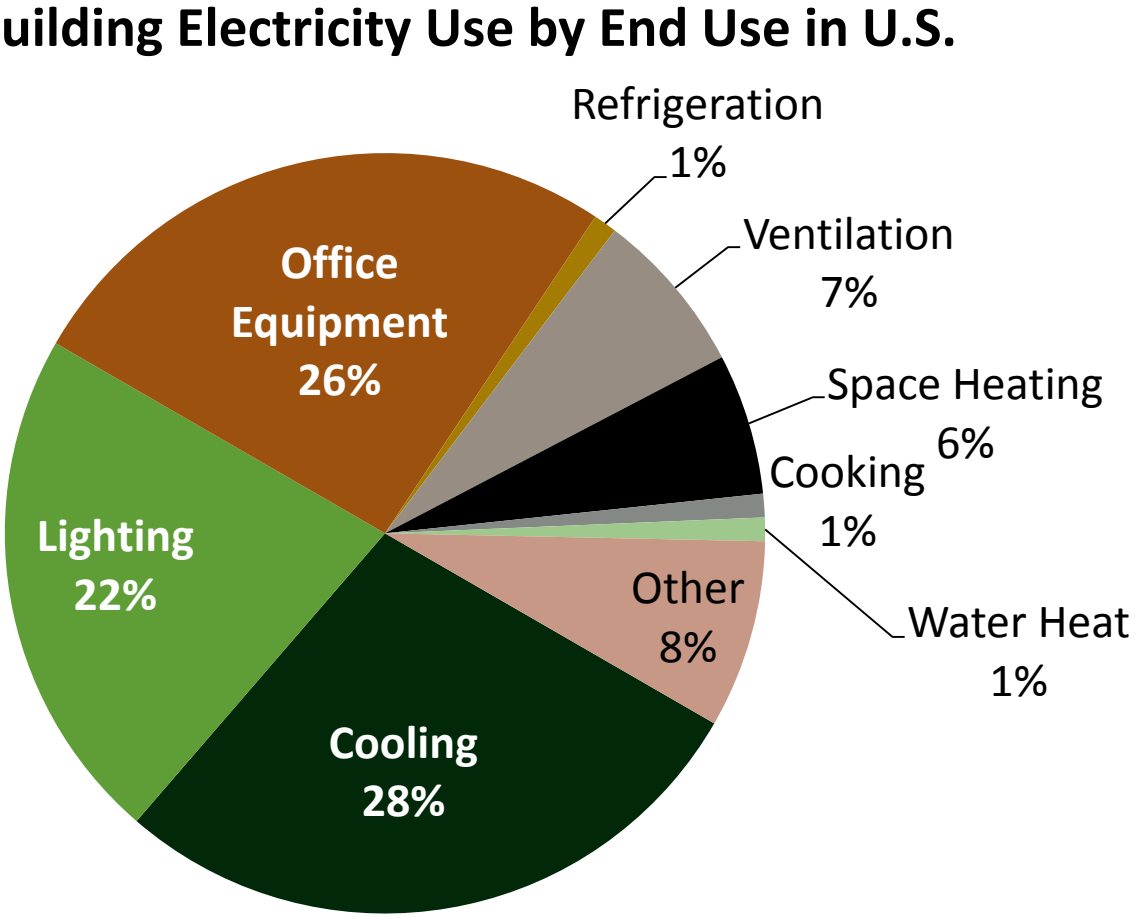
#3: Decide Which Usage Categories to Target



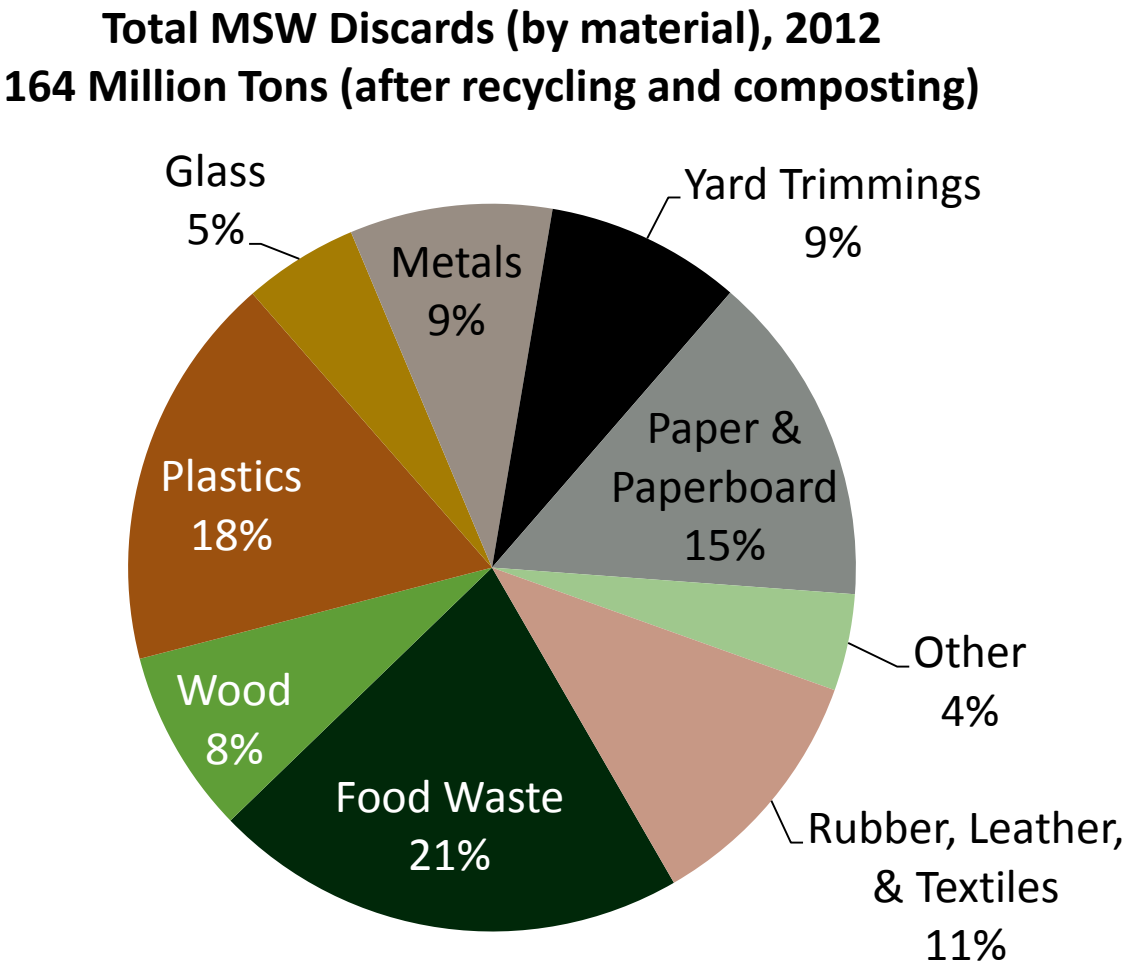
EnerNOC 2014

#3: Decide Which Usage Categories to Target



Source U.S. EIA

Waste Example



Source: U.S. Environmental Protection Agency. (2012). *Municipal solid waste generation, recycling, and disposal in the United States: Facts and figures for 2012. Retrieved from: http://www.epa.gov/osw/nonhaz/municipal/pubs/2012_msw_fs.pdf*

#4: Create a List of Behaviors

End State

- **Action Causes the Outcome**
  - *Wash clothes in cold water*
  - *Turn off computer*

Non-divisible

- **Cannot be Broken Down into Smaller Actions**
  - *Conserve energy*
  - *Many actions embedded*

Avoid Strategies

- **Not Directly Linked to Outcome**
  - *Sign an pledge*
  - *Attend a workshop*

#5: Gather IPPA Information

Impact	• How much will it affect the goal?
Probability	• How difficult is change?
Penetration	• How many already engaged?
Applicability	• For whom is it relevant?

Impact

- **Collect Data**
  - Technical Reports
  - Actual Measurement
    - Audits
    - Kill-a-Watt meter
- **Ask the Experts**
  - Independent ratings
    - 0 = No Impact
    - 10 = Significant Impact
  - Average responses
    - N=30 ideal

Probability

- **Literature Review**
  - Past Programs
    - Effects
    - Context
- **Survey the Audience**
  - Representative Sample
    - 0 = No Likelihood
    - 10 = High Likelihood
  - Question Structure
    - Specific
    - Context
  - Methods
    - Mail, Web, Telephone, Intercept

Penetration

- **Direct Observations**
  - When possible
  - Some behaviors not observable (e.g., shower length)

- **Survey the Audience**
  - Representative sample
  - One time behaviors
    - Purchase EE appliance
      - Yes/No
  - Repetitive behaviors
    - Cold water wash
      - Frequency
  - Self-Report Bias
    - Couple with observations

Applicability

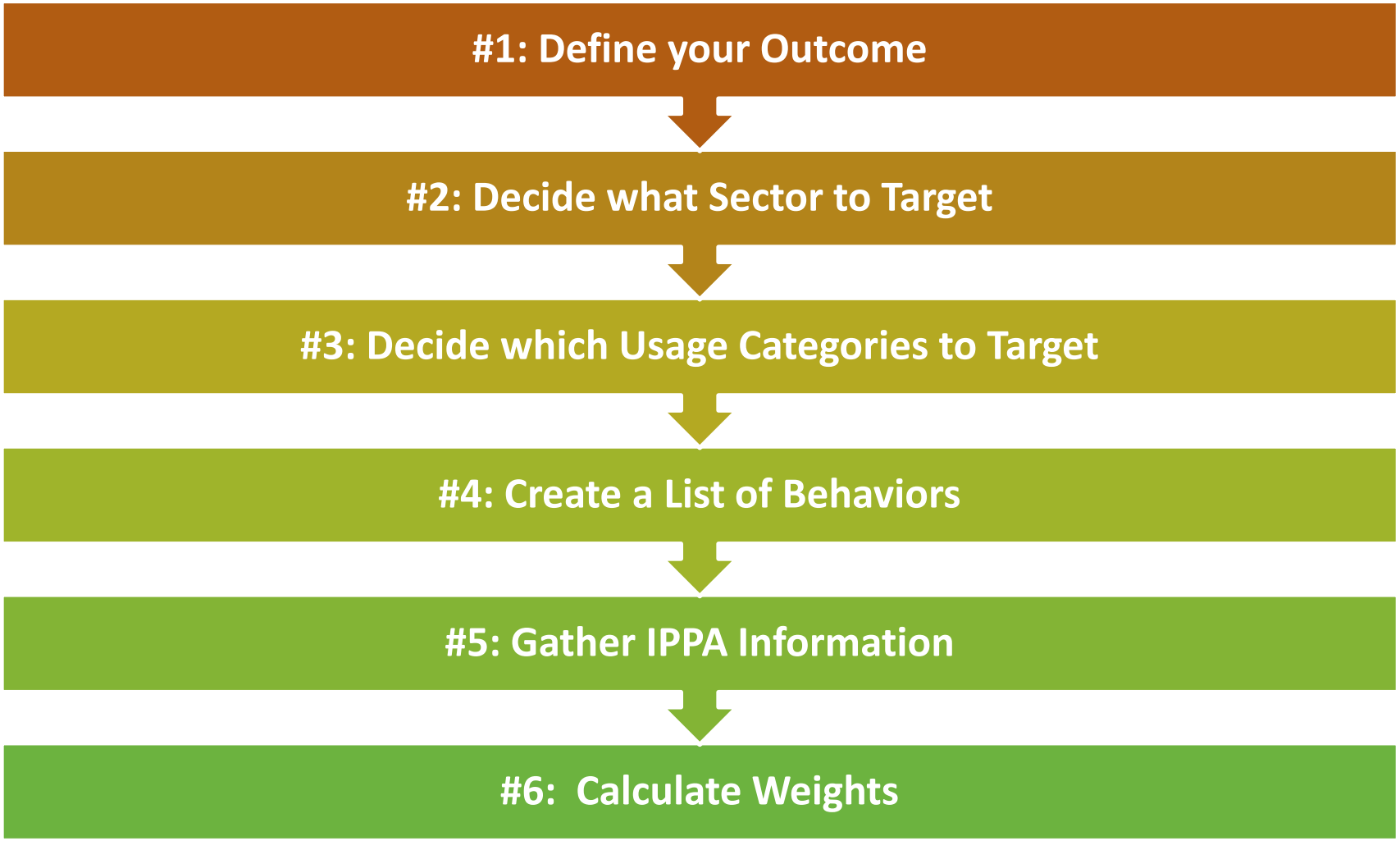
- **Proportion for whom it is relevent**
  - Census
  - Employer Profiles
  - Job Descriptions
  - Housing Stock
  - GIS Mapping
  - Etc…

#6: Calculate Weights

- **Populate Table**
  - Impact
  - Probability
  - Penetration
    - Reach (1-Penetration)
  - Applicability
- **Calculate Weights**

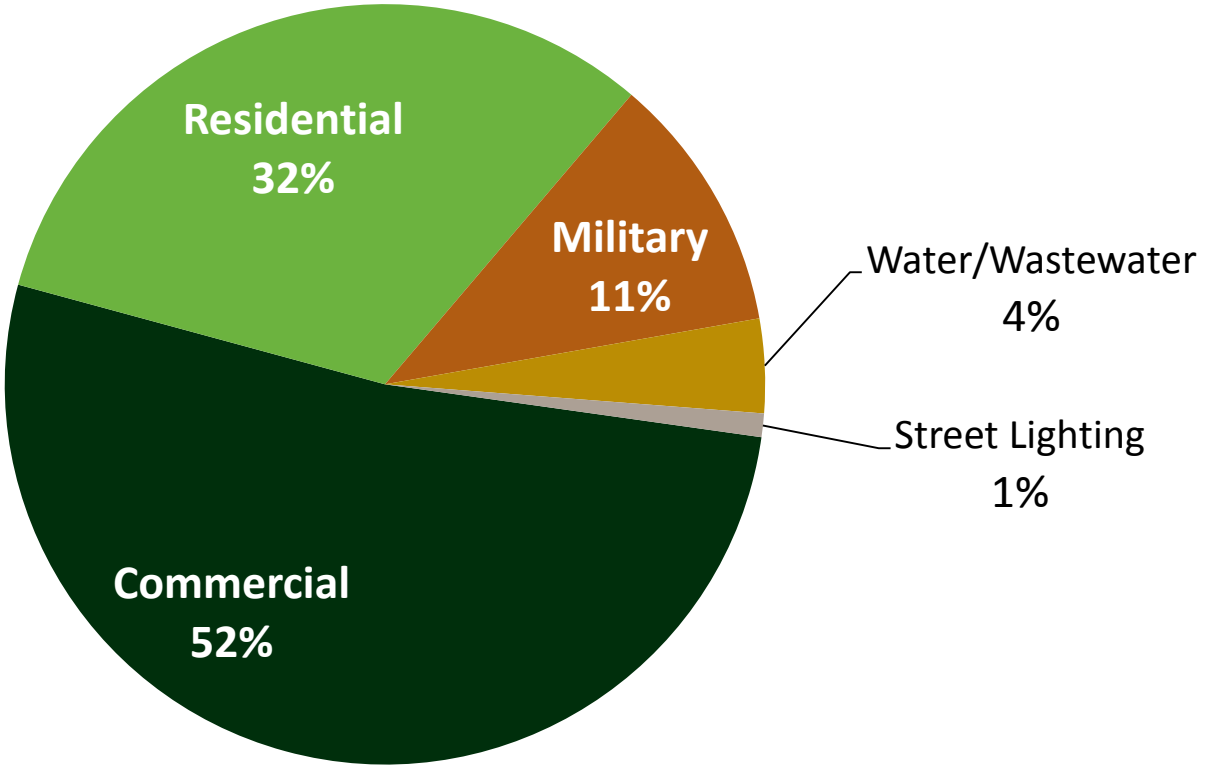
- **Weight =**
  - Impact x (1-Penetration) x Probability x Applicability

Summary of Behavior Selection Steps



Step 1: Selecting Behaviors Example

Hawaii Statewide Electricity Use by Sector, 2012



EnerNOC 2014

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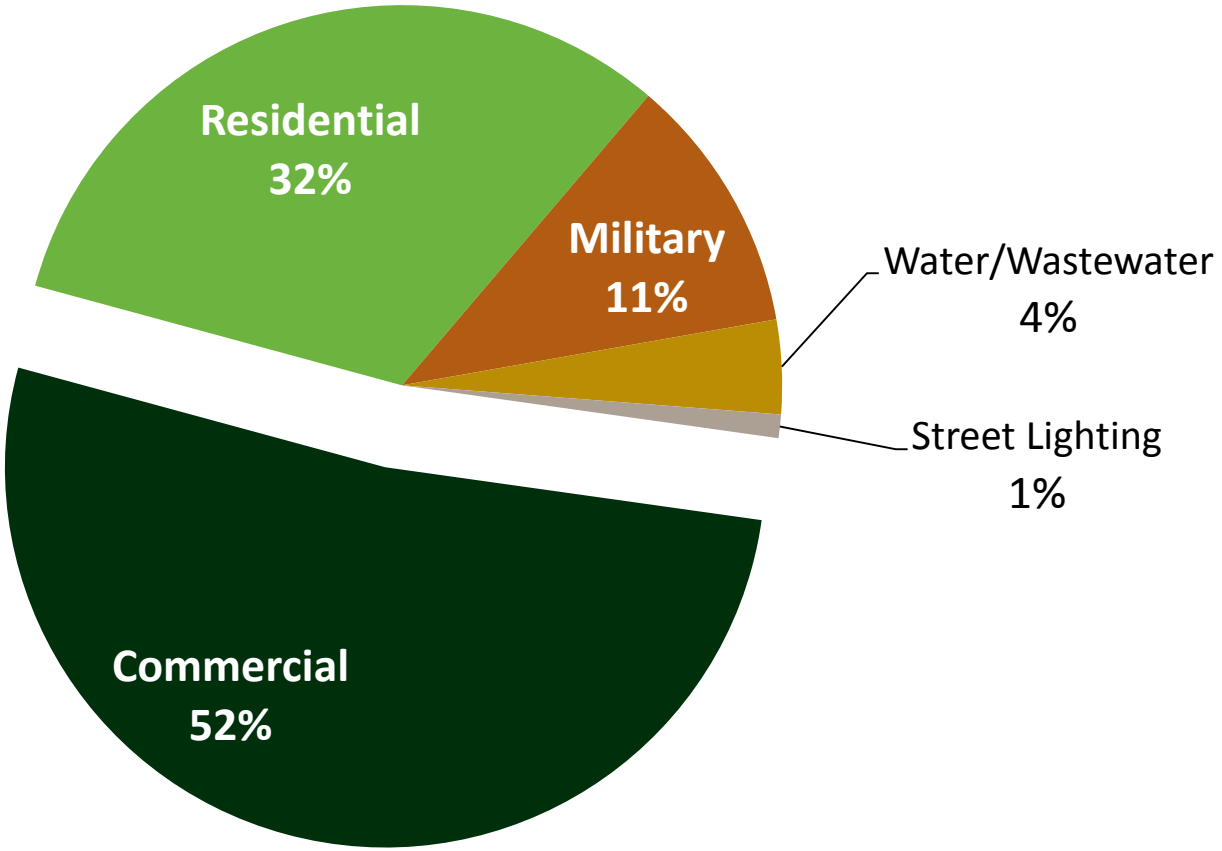

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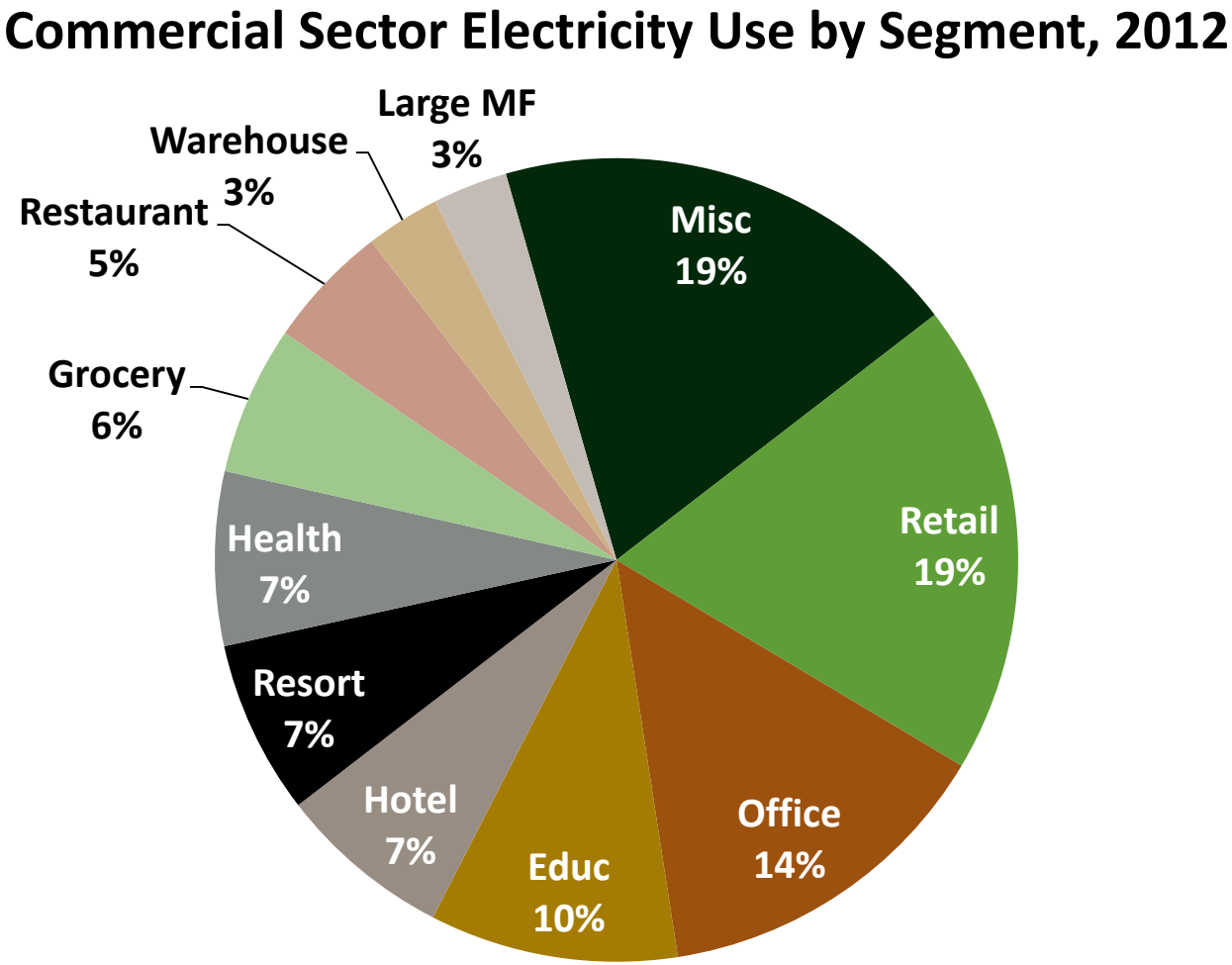
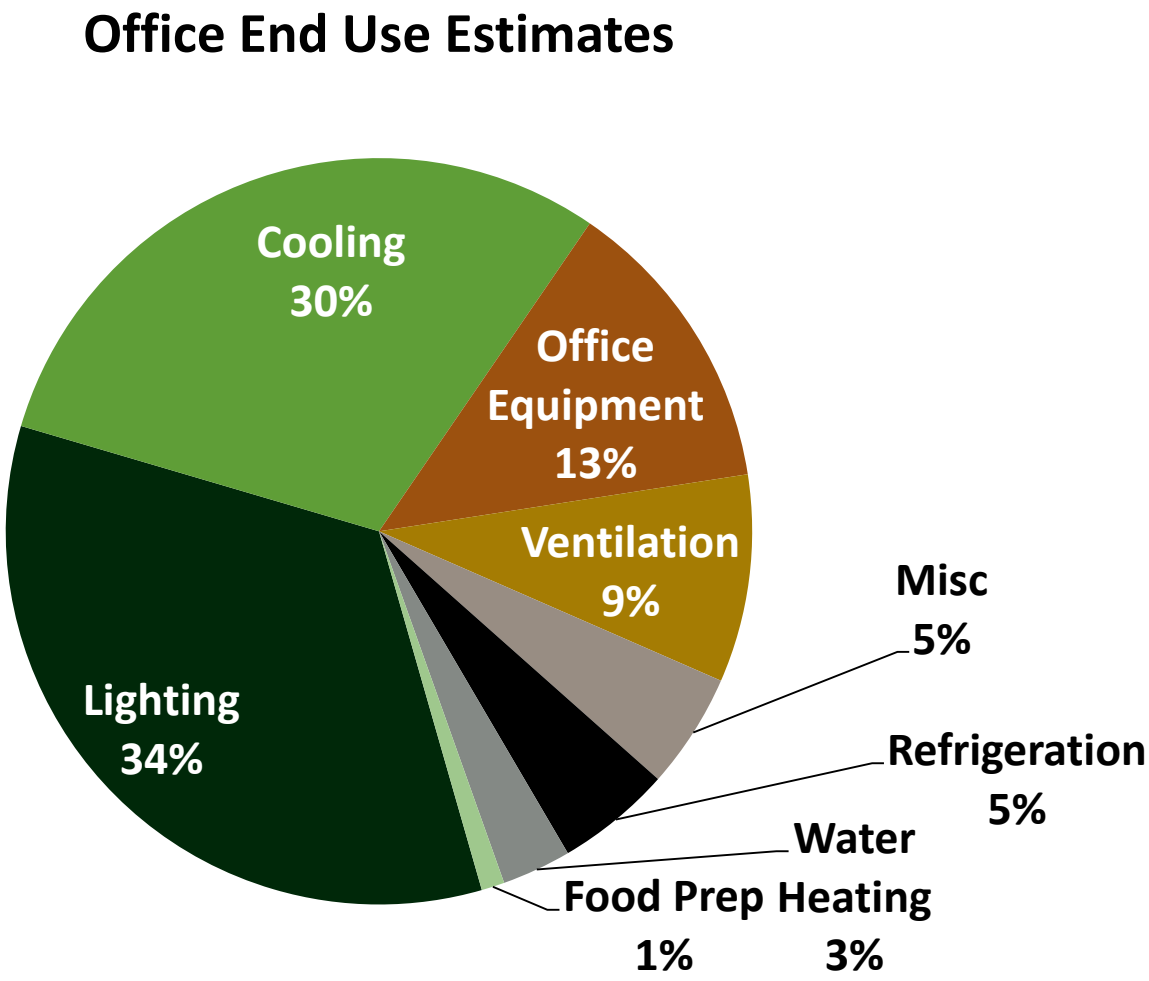


EnerNOC 2014

Step 1: Selecting Behaviors Example



EnerNOC 2014

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday						
Turn off CPU at end of the workday						
Activate power management settings						
Unplug cell phone chargers when not in use						
Use smart strip to turn off computer and peripherals						

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3					
Turn off CPU at end of the workday	6					
Activate power management settings	8					
Unplug cell phone chargers when not in use	1					
Use smart strip to turn off computer and peripherals	9					

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9				
Turn off CPU at end of the workday	6	6				
Activate power management settings	8	3				
Unplug cell phone chargers when not in use	1	9				
Use smart strip to turn off computer and peripherals	9	2				

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9	.30			
Turn off CPU at end of the workday	6	6	.60			
Activate power management settings	8	3	.28			
Unplug cell phone chargers when not in use	1	9	.10			
Use smart strip to turn off computer and peripherals	9	2	.05			

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9	.30	.70		
Turn off CPU at end of the workday	6	6	.60	.40		
Activate power management settings	8	3	.28	.72		
Unplug cell phone chargers when not in use	1	9	.10	.90		
Use smart strip to turn off computer and peripherals	9	2	.05	.95		

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9	.30	.70	.90	
Turn off CPU at end of the workday	6	6	.60	.40	.60	
Activate power management settings	8	3	.28	.72	.75	
Unplug cell phone chargers when not in use	1	9	.10	.90	1.00	
Use smart strip to turn off computer and peripherals	9	2	.05	.95	.60	

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9	.30	.70	.90	
Turn off CPU at end of the workday	6	6	.60	.40	.60	
Activate power management settings	8	3	.28	.72	.75	
Unplug cell phone chargers when not in use	1	9	.10	.90	1.00	
Use smart strip to turn off computer and peripherals	9	2	.05	.95	.60	

1 Behavior (end state, non-divisible)	2 Impact (0-10)	3 Probability (0-10)	4 Penetration (0.00 – 1.00)	5 Reach 1-Penetration	6 Applicability (0.00 – 1.00)	7 Weight 2*3*5*6
Turn off computer monitor at the end of the workday	3	9	.30	.70	.90	**17.01**
Turn off CPU at end of the workday	6	6	.60	.40	.60	**8.64**
Activate power management settings	8	3	.28	.72	.75	**12.96**
Unplug cell phone chargers when not in use	1	9	.10	.90	1.00	**8.10**
Use smart strip to turn off computer and peripherals	9	2	.05	.95	.60	**10.26**

Tools

Data Collection Worksheet

Calculation Spreadsheet

Sample Survey Items

Data Collection Worksheet

Worksheet #1

Identify the Primary Outcome

What is the primary outcome that you are interested in?

Highlight only one. Complete additional worksheets for other outcomes as necessary.

- ☐ Water Use/Conservation
- ☐ Water Runoff
- ☐ Water Quality
- ☐ Air Quality
- ☐ Other: _____

Identify Metrics

How can changes in your target outcome be measured?

Type your response here.

List Behaviors

Using the spaces below, please list six to ten behaviors that directly impact the outcome you identified above. After listing the behaviors, go back through the list and ask yourself if they are end-state. That is, be sure that they DIRECTLY impact the outcome in a measureable way.

#	What is the Behavior?	End State?
1		☐ YES ☐ NO
2		☐ YES ☐ NO
3		☐ YES ☐ NO
4		☐ YES ☐ NO
5		☐ YES ☐ NO
6		☐ YES ☐ NO
7		☐ YES ☐ NO
8		☐ YES ☐ NO
9		☐ YES ☐ NO
10		☐ YES ☐ NO

2. The people who I want to participate in this behavior are (select only one):

- ☐ Other Teenagers (e.g., friends or classmates)
- ☐ Family Members
- ☐ Community Members
- ☐ Other: _____

3. Assuming that the program is successful, how large of an impact do you think that the behavior change will have on Ocean Acidification or CO_2 Emissions reduction?

☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
0	1	2	3	4	5	6	7	8	9	10
No impact										Huge impact

4. How will the impact of the behavior change be measured? In other words, how might you know if behavior changed?

5. Based on research you have read, input from experts, and/or your own experience, how many people in the target audience are already participating in this behavior? Please provide a response between 0% (none) and 100%. _____% are already doing it

6. What was the source for the information you provided in #5 above (e.g., internet source, guess, etc.):

- ☐ Research Report: Title:_____
- ☐ Internet Research: Web Address:_____
- ☐ An Expert: Who?_____
- ☐ A Guess or My Own Experience
- ☐ Other: _____

7. How likely is it that the people who are not yet participating in the behavior can be encouraged to do it? Please select a response using a scale from 0 (Not a Chance) to 10 (Definitely Will).

☐	☐	☐	☐	☐xx	☐	☐	☐	☐	☐	☐
0	1	2	3	4	5	6	7	8	9	10
Not a chance										Definitely will

8. What was the source for the information you provided in #7 above (e.g., internet source, guess, etc.):

- ☐ Research Report: Title:_____
- ☐ Internet Research: Web Address:_____

Calculation Spreadsheet

#	Behavior	Impact	Penetration	Reach (100%-Penetration)	Probability	Applicability	TOTAL WEIGHT
1				100%			0.00
2				100%			0.00
3				100%			0.00
4				100%			0.00
5				100%			0.00
6				100%			0.00
7				100%			0.00
8				100%			0.00
9				100%			0.00
10				100%			0.00
11				100%			0.00
12				100%			0.00
13				100%			0.00
14				100%			0.00

Sample Survey Items

This section is about energy-saving equipment or devices you may or may not have installed in your home.
If you are unable to do any of these things because you rent your apartment and don't purchase certain appliances, or don't have a place for these appliances in your unit, check ✓ *Does Not Apply*.

1: **Do you currently have any of the following installed in your home?**	**Yes**	**No**	**Don't Know**	**Does Not Apply**
a: Energy-efficient CFL light bulbs?	☐	☐	☐	☐
b: Energy-efficient LED light bulbs?	☐	☐	☐	☐
c: A thermostat programmed to keep your home at a temperature of 78° or warmer?	☐	☐	☐	☐
d: Energy-saving window film to reduce the amount of heat that enters your home?	☐	☐	☐	☐
e: An Energy Star® *window* air conditioner?	☐	☐	☐	☐
f: An Energy Star® *split system* air conditioner?	☐	☐	☐	☐
g: A *central* air conditioner?	☐	☐	☐	☐
h: An Energy Star® dishwasher?	☐	☐	☐	☐
i: An Energy Star® refrigerator?	☐	☐	☐	☐
j: An Energy Star® clothes washer?	☐	☐	☐	☐
k: Efficient WaterSense® shower heads (1 – 1.5 gallons per minute)?	☐	☐	☐	☐
l: An insulating blanket on your hot-water storage tank?	☐	☐	☐	☐

Section 2. Installing or Replacing with Energy-Saving Equipment in the Next Year

These questions are about energy-saving equipment or devices you may or may not install *in the next year*.
If you stated in Section 1 above that you already have one, please check ✓ Done. If this is something that your landlord or building owner would have to do, please check ✓ *Does Not Apply*.

2: **On a scale of 0 to 10, where 0 is *Not At All Likely* and 10 is *Extremely Likely*,**

how likely is your household to . . .	***Not at All Likely***										***Extremely Likely***
a: Replace traditional light bulbs with energy-efficient CFL light bulbs? ☐ Done ☐ Does Not Apply	0	1	2	3	4	5	6	7	8	9	10
b: Replace traditional light bulbs with energy-efficient LED light bulbs? ☐ Done ☐ Does Not Apply	0	1	2	3	4	5	6	7	8	9	10

Q & A

Behaviors of Interest

Data Sources

Challenges/Concerns

Post-Webinar Survey

http://survey.takeactionresearch.com/cgi-bin/rws5.pl?FORM=SSDNpostwebinar

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