

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.
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 - 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.
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Community-Based Social Marketing

SSDN Education to Execution Workshop Series



Webinar #3: Strategy and Message Design

November 3, 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.**



Research • Social Marketing • Results

Agenda

Introductions (5 min)

- Announcements

Background (5 min)

- Process Overview

Barrier and Benefit Research Review (15 min)

- Lessons Learned

Strategy and Message Design (40 min)

- Behavior Change Tools
- Resources and Planning

Q&A (25 min)

- Implementation Plans
- Challenges/Concerns

Introductions

SSDN: Housekeeping & Announcements

Action Research: Questions from Webinar #2

Background

Webinar Series Overview

Process Overview

Community-Based Social Marketing

Select Behavior



```
graph TD; A[Select Behavior] --> B[Barriers & Benefits]; B --> C[Develop Strategy]; C --> D[Pilot Test]; D --> E[Implement Broadly & Evaluate];
```

Barriers & Benefits

Develop Strategy

Pilot Test

Implement Broadly & Evaluate

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

Webinar Series Overview

- ❑ **Sept: Selecting and Prioritizing Behaviors**
 - ❑ *Training and Tools*
- ❑ **Oct: Conducting Barrier and Benefit Research**
 - ❑ *Methods, Best Practices, Instruments, Resources*
- ❑ **Nov: 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*

Barrier and Benefit Research

Implementation Experiences

Lessons Learned

Questions

Step 2: Identify Barriers and Benefits

- ❑ NOT based on a hunch!

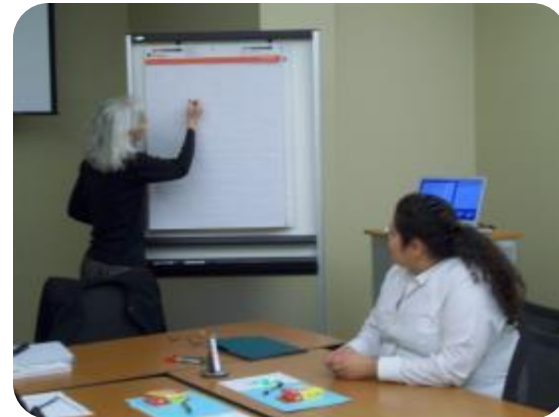
- ❑ Find target population

- ❑ Starting point

- ❑ Literature Reviews
 - ❑ Observations
 - ❑ Focus Groups

- ❑ Surveys

- ❑ In-person
 - ❑ Telephone
 - ❑ Mail
 - ❑ Web-based

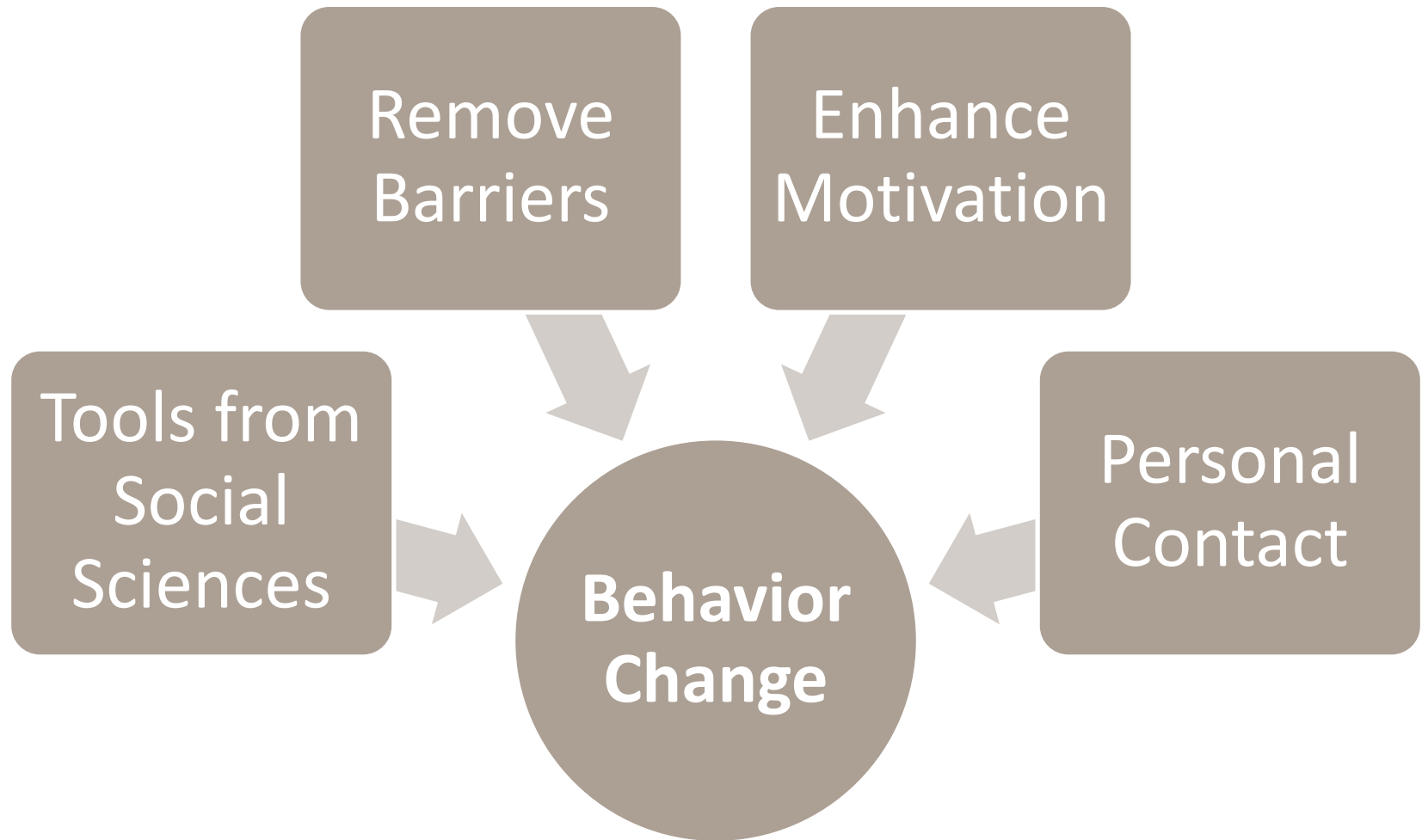


Strategy & Message Design

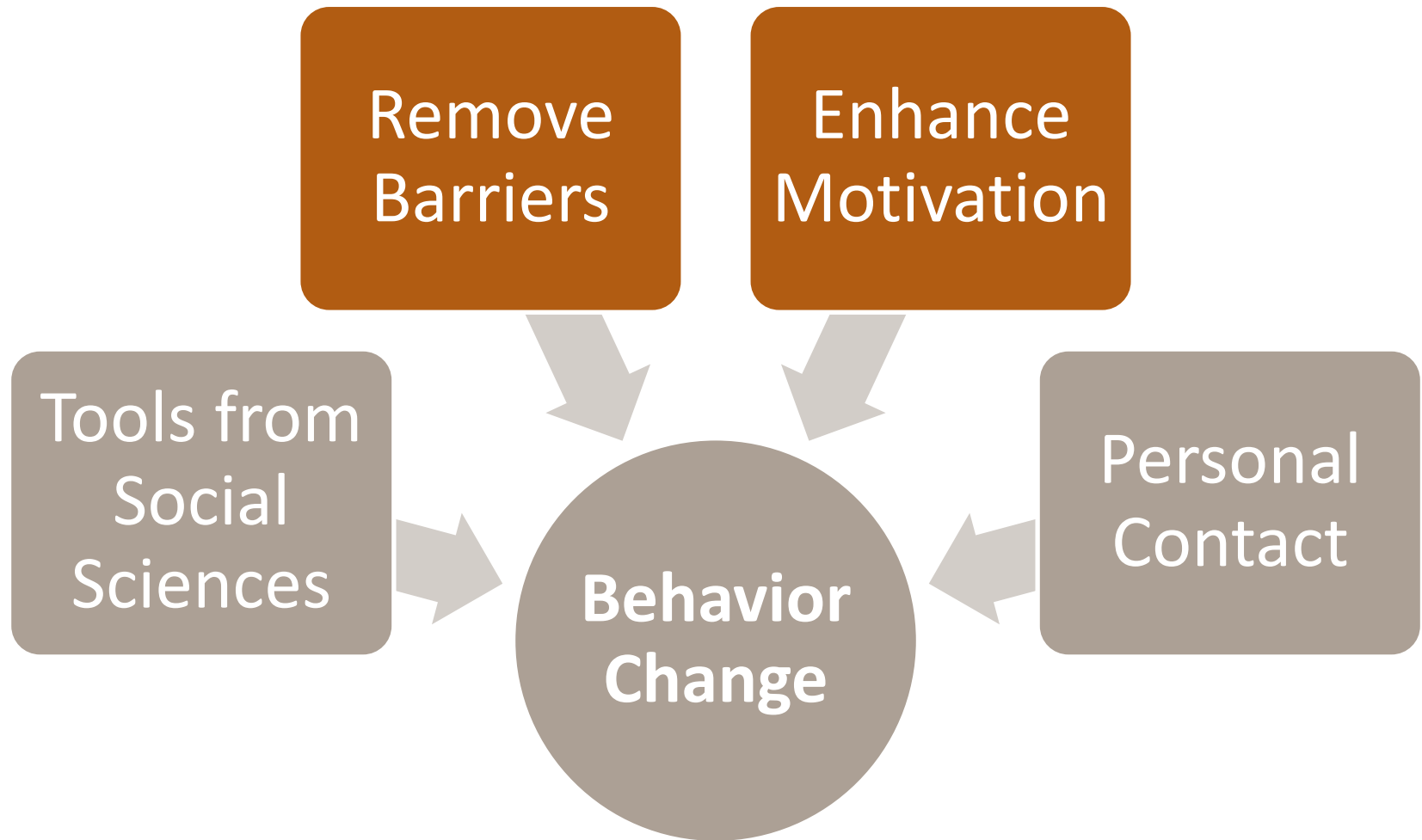
Behavior Change Tools
Resources & Planning



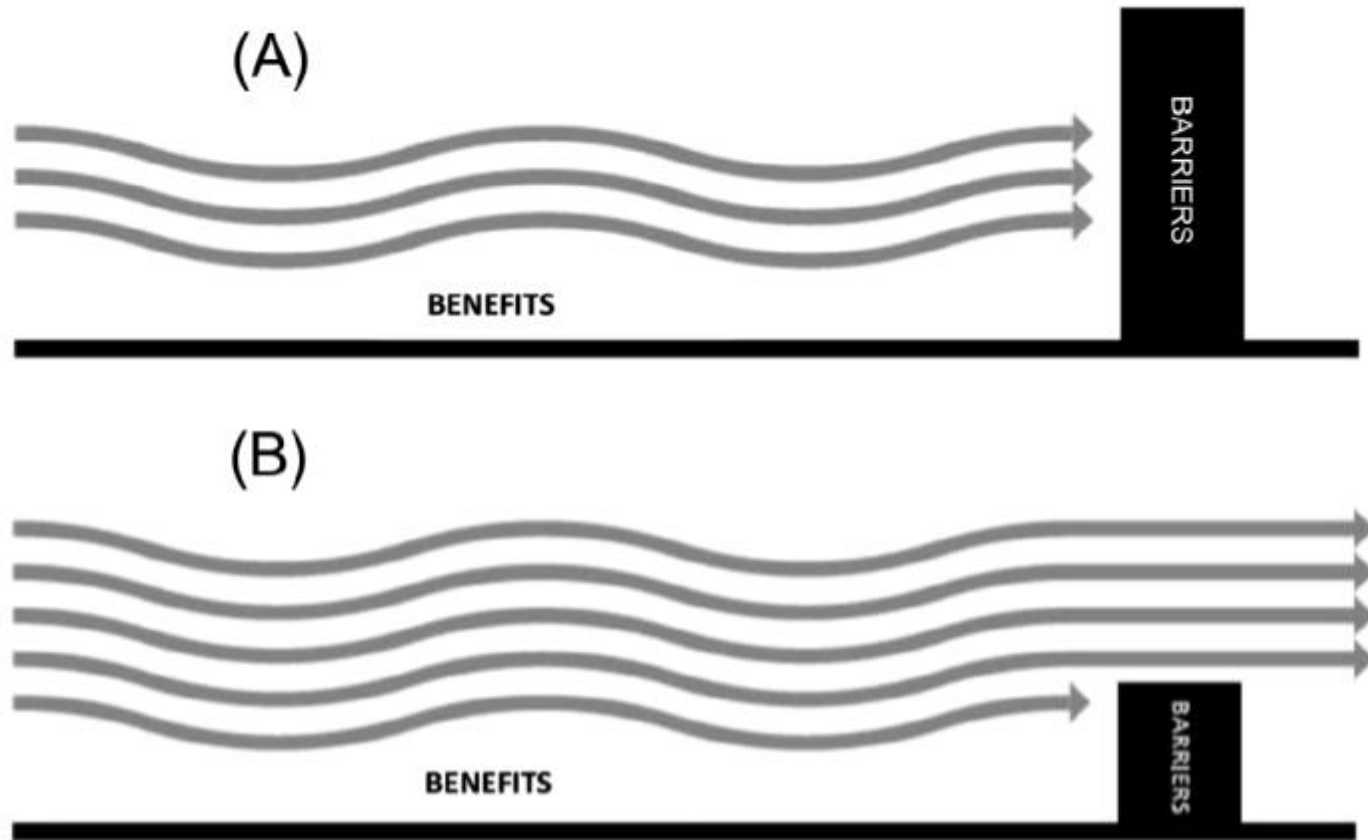
Step 3: Develop Strategy



Step 3: Develop Strategy

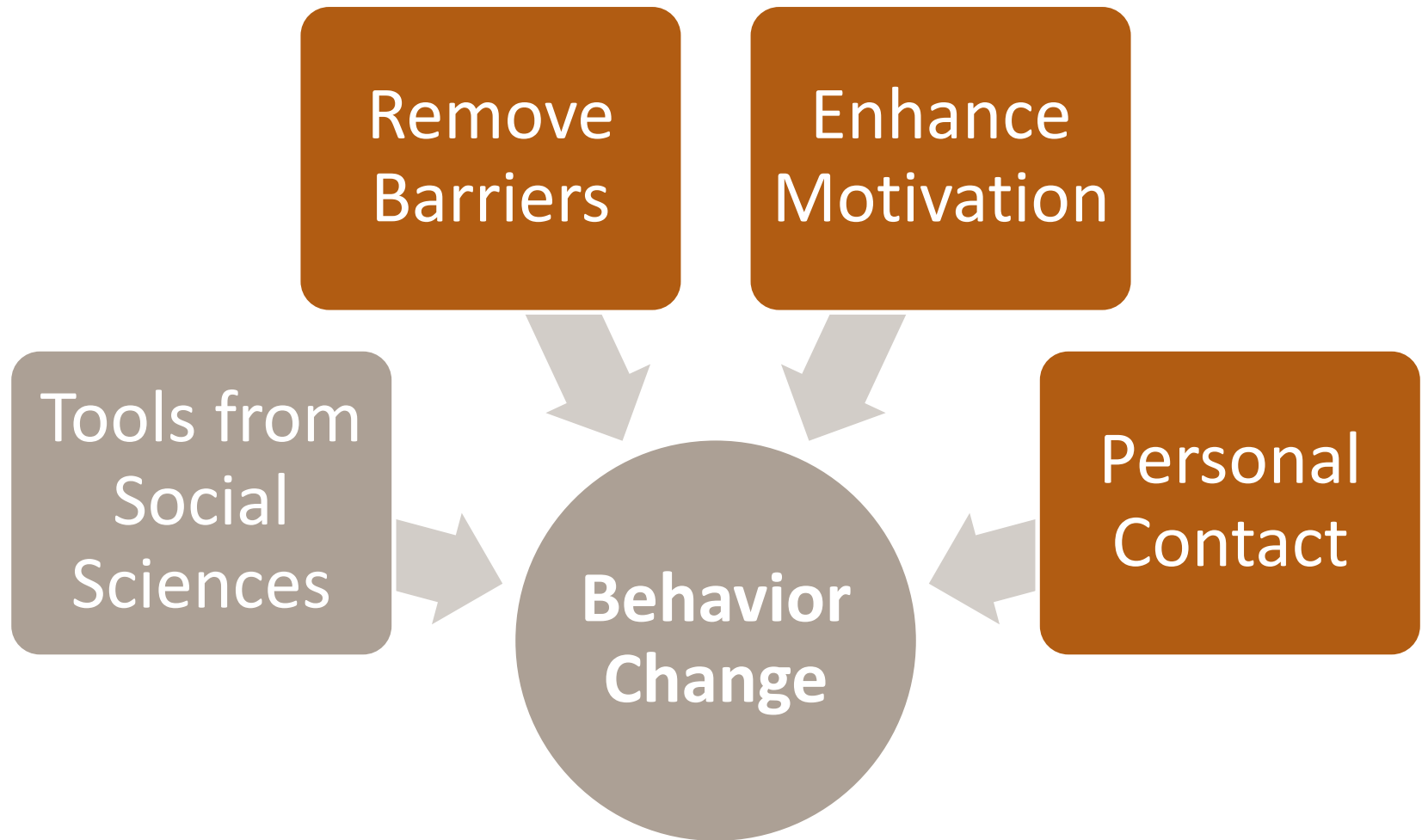


Remove Barriers & Enhance Benefits

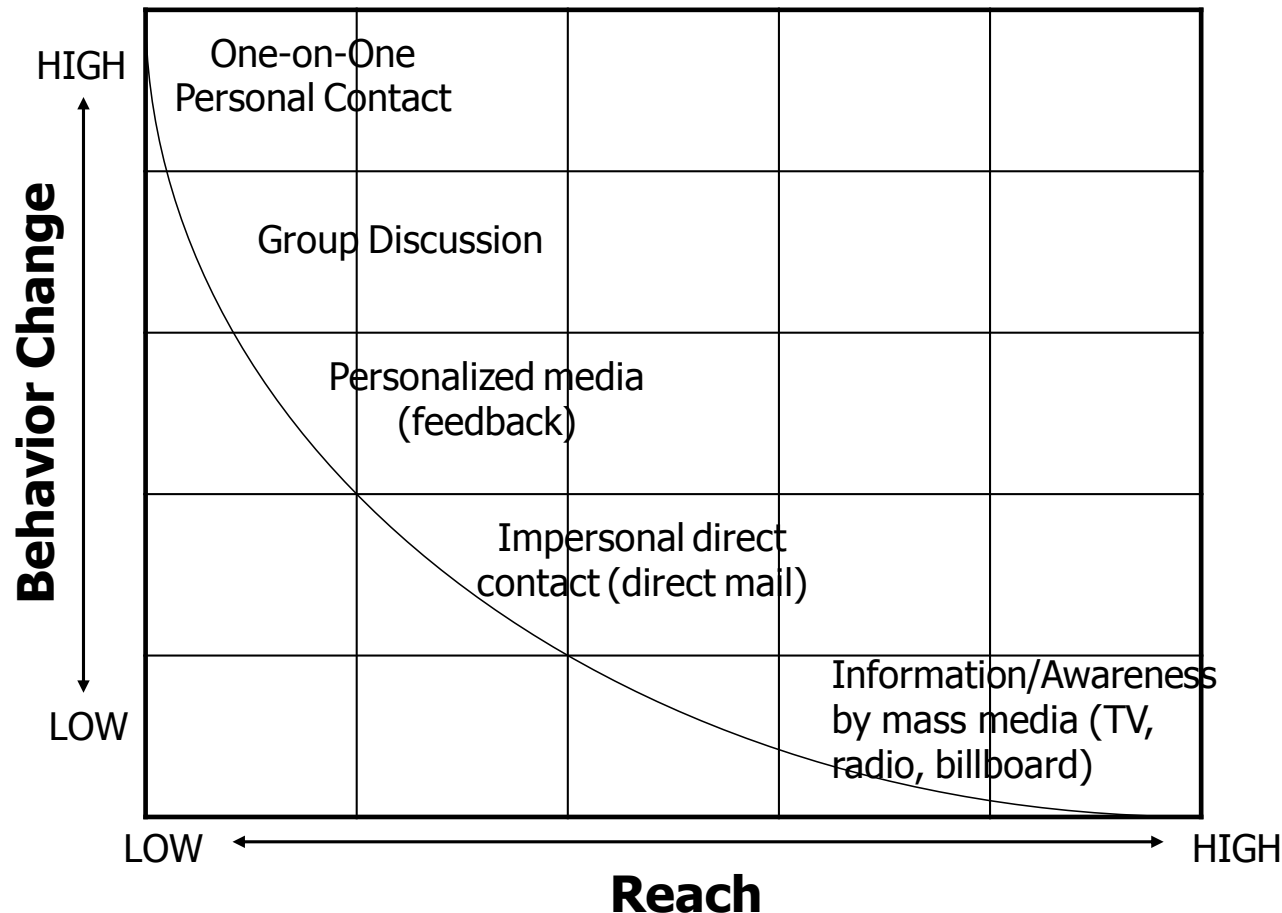


Graphic From: Schultz, P. W. (2013). Strategies for promoting proenvironmental behavior: Lots of tools but few instructions. *European Psychologist*.

Step 3: Develop Strategy

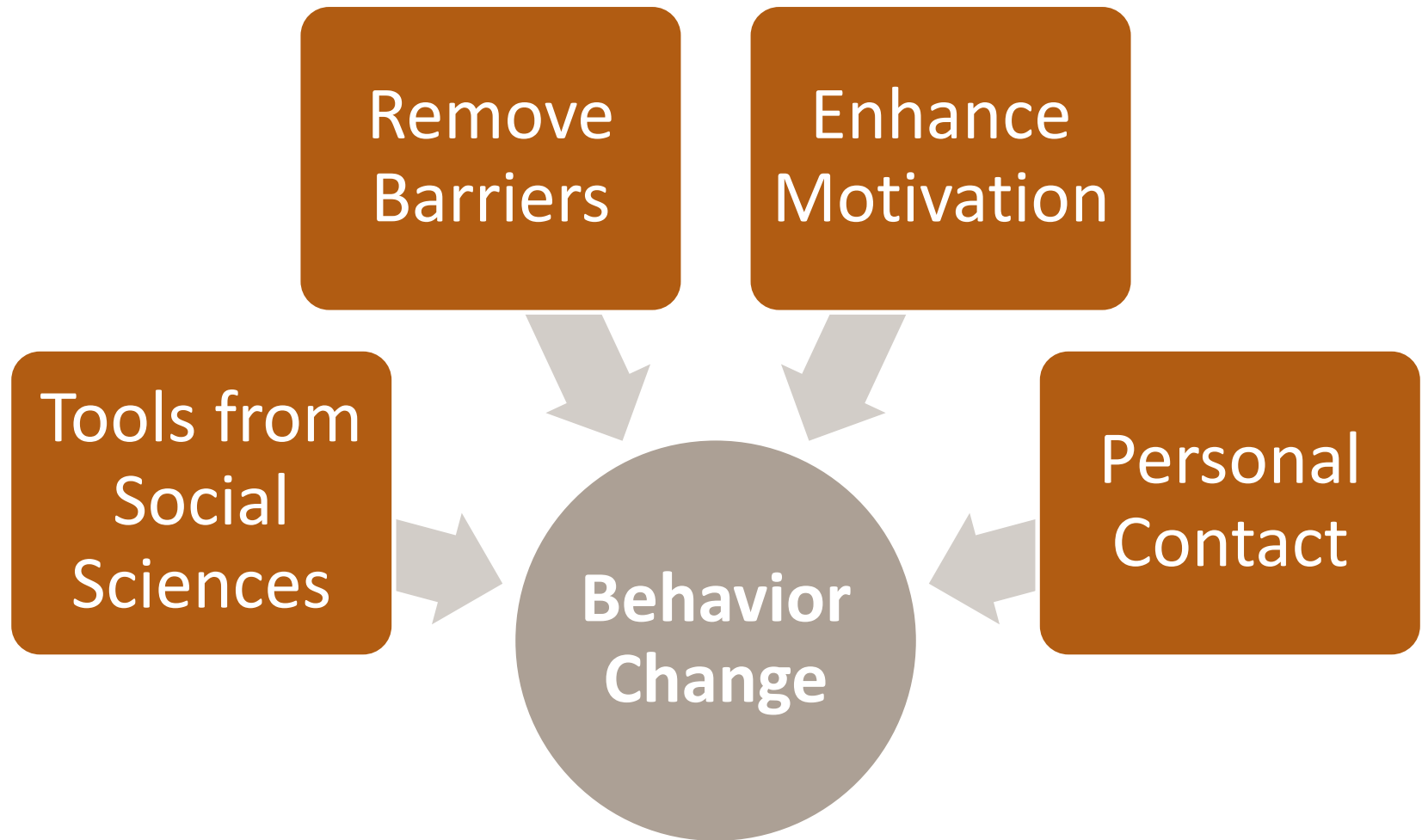


Personal Contact: Reach vs. Impact



Graphic from: Schultz, P.W., & Tabanico, J. (2007). Community-based social marketing and behavior change. In A. Cabaniss (Ed.), *Handbook on Household Hazardous Waste*. Lanham, MD: Rowan and Littlefield.

Step 3: Develop Strategy



Social Science Tools



Incentives



Contests



Social Modeling



Social Norms



Convenience
(Make it Easy)



Commitments



Education



Feedback



Prompts



Cognitive
Dissonance

Tools: Commitment

- ❑ Desire to act consistent
 - ❑ Commitments
 - ❑ Values
 - ❑ Past Behavior
- ❑ Agreement to small request can alter self perception
 - ❑ NYC theft study



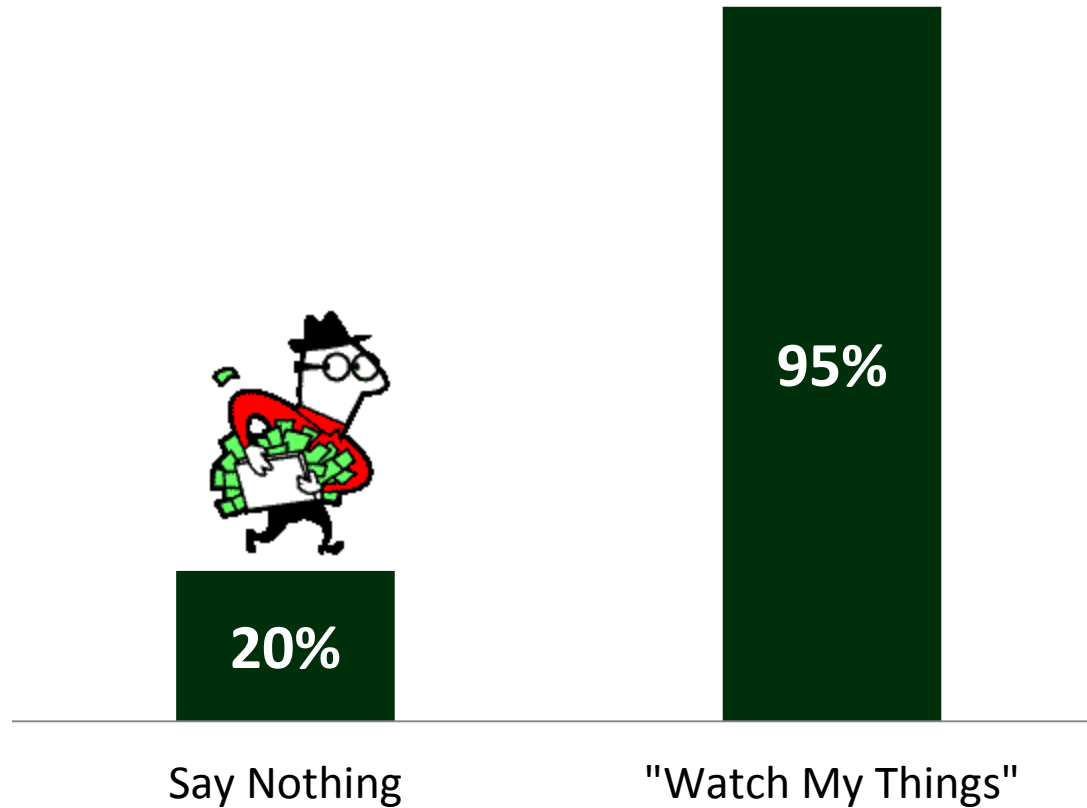
Tools: Commitment

How Many Chased the Thief?



Tools: Commitment

How Many Chased the Thief?



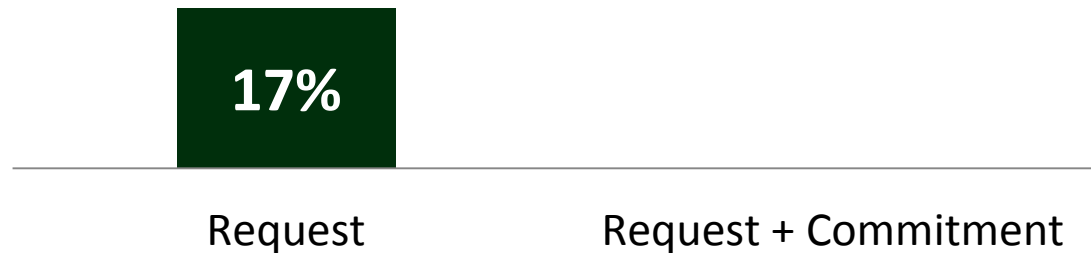
Tools: Commitment

Would you let us put a 6 ft x 3ft billboard stating “DRIVE CAREFULLY!” on your lawn?



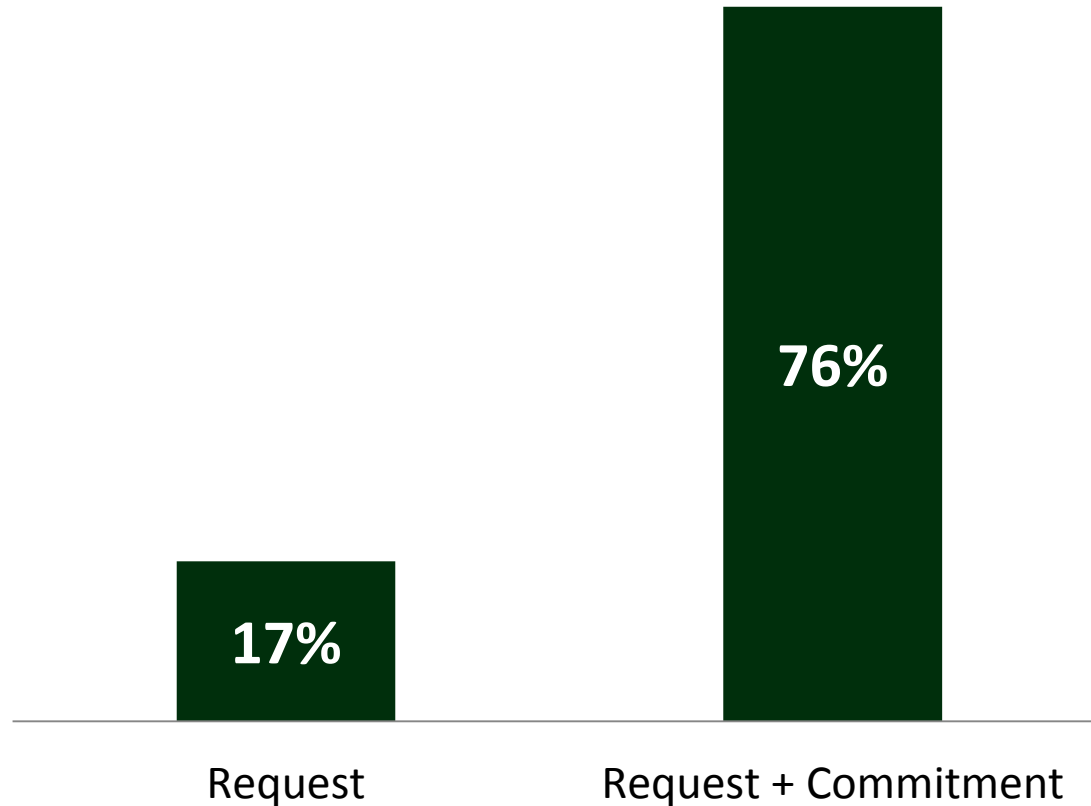
Tools: Commitment

How Many Said Yes?



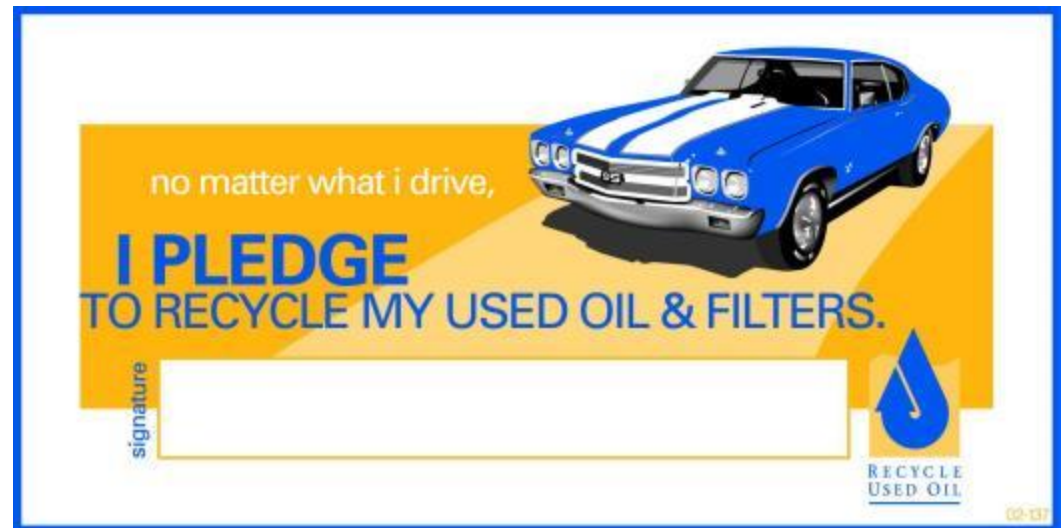
Tools: Commitment

How Many Said Yes?



Tools: Commitment

- ❑ Written
- ❑ Public
- ❑ Active Involvement
- ❑ Voluntary
- ❑ Cohesive Groups
- ❑ Callbacks



Tools: Commitment



**CHANGE THE WORLD,
START WITH ENERGY STAR**
Take the ENERGY STAR Pledge

Tools: Commitment

28

Take the Pledge



Help Burlington reach its goal and join your neighbors, family and friends in pledging your Ways to Save.

It's easy!
Check the boxes to the right to indicate how you'll save energy at home.

Personal information is used for internal purposes only and will not be shared, sold, or otherwise distributed.

- ☐ **Install energy-efficient lighting and appliances.**
I'll cut my electric bill by \$60 per year when I replace standard bulbs with CFLs in my five most frequently used light fixtures.
- ☐ **Unplug electronic devices when not in use.**
In the average home, 75 percent of the electricity used to power home electronics and appliances is consumed while the devices are turned off.
- ☐ **Switch off lights and use natural lighting.**
I'll turn my lights off and on—it uses less energy than leaving them on all the time. Also, I'll open curtains and shades during the day instead of using lighting.
- ☐ **Use water-saving devices and an energy-efficient water heater.** I'll install a low-flow showerhead to save hot water.
- ☐ **Turn my thermostat down a few degrees in winter and up a few degrees in summer.**
I'll save 10 percent or more on winter heating bills when I set my thermostat at 60°F when I'm sleeping or gone, and 68°F when I'm at home.

Name _____

Email _____

Address _____

Learn More



Now that you have taken the pledge to save energy and money, it's time to learn more about programs and incentives to help you to save even more by making energy efficiency improvements to your home. Everyone is eligible for incentives regardless of whether you rent or own and whether you live in a single family home or a multifamily home.

There are incentives and rebates for:

- Single family homes
- Multifamily buildings, including free installation of efficient light bulbs, faucet aerators and showerheads
- Commercial and industrial businesses, including free energy assessments
- Non-profits, including free energy assessments.

If you are interested in learning more about incentives and rebates for energy efficiency upgrades, contact Kevin, the Way to Save, Burlington! energy ambassador, at kduffy@waytosaveburlington.com or 262.721.7540.

We're Saving Energy and Money!

Tools: Commitment



We've explored, imagined, played, and observed to help us understand our connection with the ocean and nature.

After you leave the Aquarium,
what are you going to do outdoors?



I am going to
walk a trail in my
backyard and look
for the creek.



DISCOVER

Tools: Commitment

- ❑ PG&E
- ❑ Auditors trained to secure verbal commitment
 - ❑ “I’ll give you a call to see how it’s going”
- ❑ Substantial increase in completed retrofits



Tools: Commitment

- ❑ Ask if names and energy savings could be put in the newspaper.
- ❑ Never actually published
- ❑ Increased electricity savings by 20% and natural gas by 15%
- ❑ Savings still observed 12 months later



Tools: Social Norms

- ❑ People look outside themselves and to other people around them to guide their decisions and actions
 - ❑ Ambiguous situations
- ❑ Expectations about the behavior, thoughts, or feelings that are appropriate within a given context
 - ❑ Descriptive
 - ❑ Injunctive
 - ❑ Powerful influence on behavior
 - ❑ Not typically viewed as influential

Which one attracts more tips?

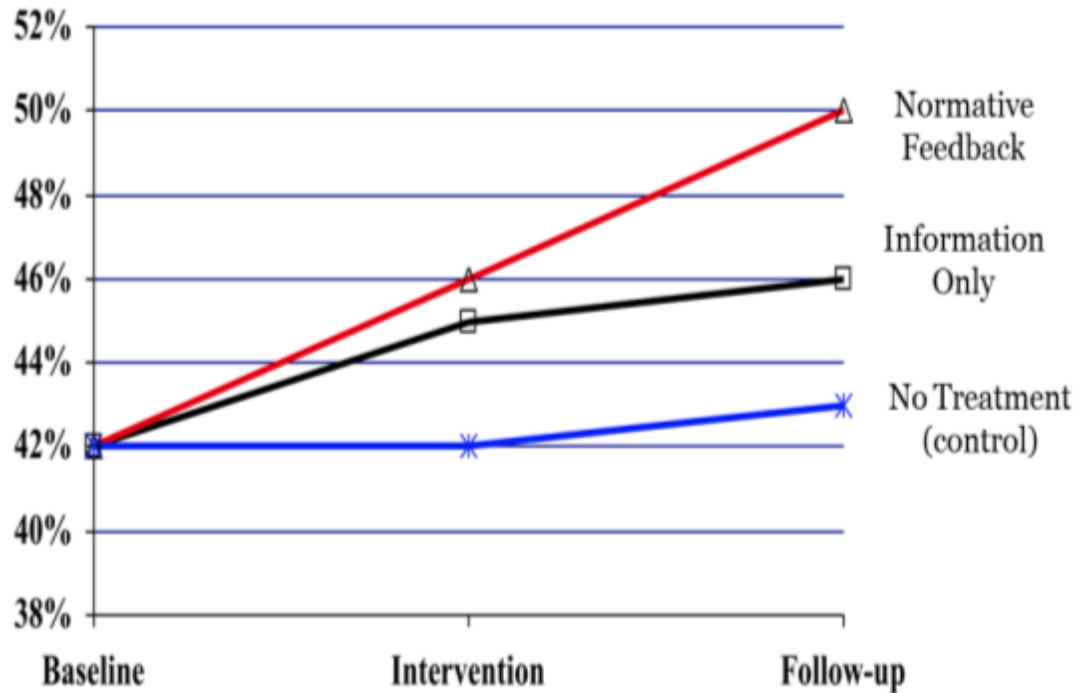


Tools: Social Norms


- ❑ Gawking Study
 - ❑ Milgram, Bickman, & Berkowitz (1969)
- ❑ Who stopped to look?
 - ❑ N=1 (4%)
 - ❑ N=5 (18%)
 - ❑ N=15 (40%) – stopping traffic!



Tools: Social Norms



Tools: Social Norms



Upper Valley Agency
WASTE MANAGEMENT
1199 Third Street
Room 301
Napa, CA 94550

Upper Valley Special Service
PO Box 3852
St. Helena, CA 94574

Detach and Mail Today!

Desprenda y regrese la tarjeta para que reciba gratis un recipiente para almacenar el aceite usado.

Paid for by a grant from the California Integrated Waste Management Board

HERE'S WHAT SOME OF YOUR NEIGHBORS SAY ABOUT CURBSIDE OIL PICK-UP:

"It's great! It's a very handy program, and I'm absolutely satisfied... If you're going to recycle your oil, no doubt it makes it easier... Oil is a finite resource, and it should be recycled!"
Stephanie Strouss, Angwin


"I use the program every time I change the oil in my vehicles... I know other people in the community do too."
Robert Holland, Angwin

"The program works well; it's a nice service from Upper Valley Disposal. It's so easy...you just call and they come. I don't have any complaints about it and we've used it for a long time...I'm sure other people do (too)."
Anonymous, St. Helena

"It couldn't be easier...everybody should use it; that's the bottom line!"
Juling Pesalo, Calistoga


"I use it every time the oil is changed."
Ellie Sanders, Calistoga

"We use the program once a month...When we change the oil we just put it in the container...It makes it very easy!"
Charlotte Rice, St. Helena




"It's worked very well for us... I just think that it's very important that all of us be responsible to not pollute our environment... we should put forward the effort, and I'm so thankful that we have a means of doing it without making it difficult."

Evaline West, Angwin




Upper Valley Agency
WASTE MANAGEMENT
1199 Third Street
Room 301
Napa, CA 94550

Are you one of the
20,000
residents in Napa County who change their own motor oil?



"Everybody should use it!"
Larry Varland, St. Helena



CURBSIDE OIL RECYCLING
"Free, Easy and Convenient"



Get Clothes **Clean** And Save **Energy**
By Using Cold Water!

Clean Clothes

Change temperature, not brand. You don't need a special detergent to get your laundry clean in cold water. *Consumer Reports* gave these detergents high marks for cleaning in all temperatures.

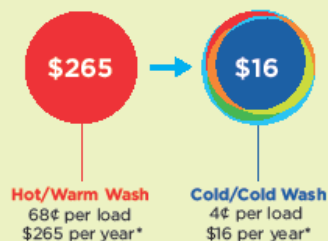
Detergent Brand	Price Per Load	Washer Model
Tide for Cold Water	18¢	Top-Load
Up & Up Ultra Concentrated (Target)	10¢	Top-Load
Tide Ultra plus Bleach*	23¢	Front-Load
Tide Pods	22¢	Front-Load
Sears Ultra Plus Concentrated 9879	13¢	Front-Load

*Top-rated detergent overall

Save Energy

90% of the energy used to wash a load of laundry goes to heating the water.

Source: ENERGY STAR®



*Based on average electricity costs and about 390 loads per year.

Ask Your Neighbors

Results from a recent survey in your neighborhood found that:

- **Over 1/2** of your neighbors say they are using all or mostly **cold water** for their laundry.
- Those who wash in cold water feel strongly that it:



“

- “I have always washed with cold water, even my two boys’ clothes, and our clothes have been clean, and last much longer. Stains are also easier to remove in cold water. I would tell all my neighbors to forget the idea that whites need to be washed in hot water, since no one has ever commented that our whites weren’t so white.” —*Gretchen Lewis, Asheville*

- “I’ve been washing our laundry in cold water for over 10 years. We save energy and have lower utility bills without sacrificing anything, since we never noticed any problems with our clothes. You can lower your costs, and be good stewards of the environment at the same time.” —*Grace Curry, Asheville*

”

Cool Is Clean
and Clean Is Cool

Tools: Social Norms

Join your neighbors
in conserving
energy



Summer is here and most San Marcos residents are finding ways to conserve energy at home.

"How are most San Marcos residents conserving this summer?"

By using fans instead of A/C!



Why?

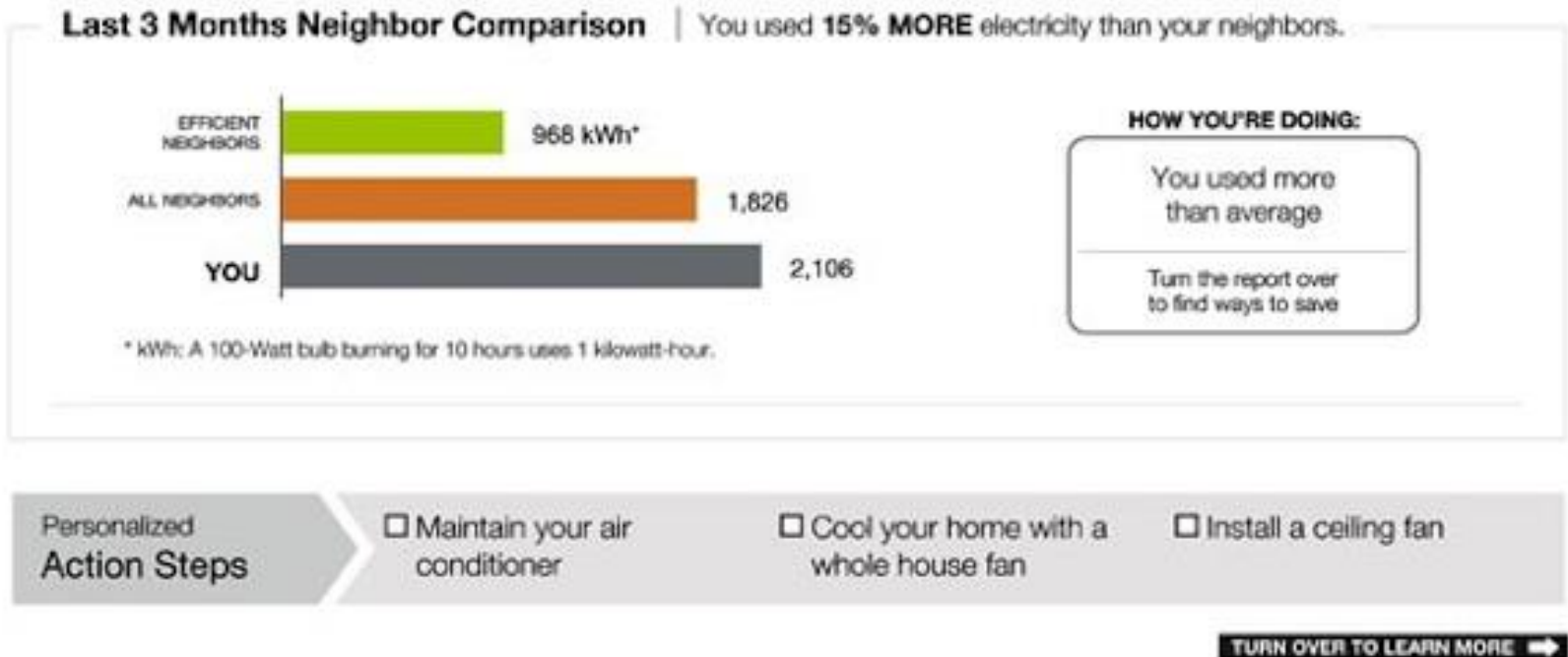
According to a recent telephone survey conducted by Cal State San Marcos, *77% of San Marcos residents said that they often use fans instead of air conditioning to keep cool in the summer.*

**Using fans instead of air conditioning –
San Marcos' Popular Choice!**



Please direct questions or comments to Jessica Nolan at CSUSM: 760.750.3022

Tools: Social Norms





Many of our guests have expressed to us the importance of using their bath towels more than once. Washing towels every day uses a lot of energy, so reusing towels is one way you can conserve. When we implemented a towel reuse program last summer, we found that 79% of our guests chose to reuse at least one of their bath towels each day.

Because so many guests value conservation and are in the habit of conserving, this resort has initiated a conservation program.

If you would like your towels replaced, please leave your used towels on the bathroom floor. Towels left hanging on the towel rack tell us that you want to reuse them.

PLEASE REUSE YOUR TOWELS

* If you have questions, please call the front desk *

Avoid Boomerang Effects

- Interventions that focus on what others **aren't** doing can lead to boomerang effect





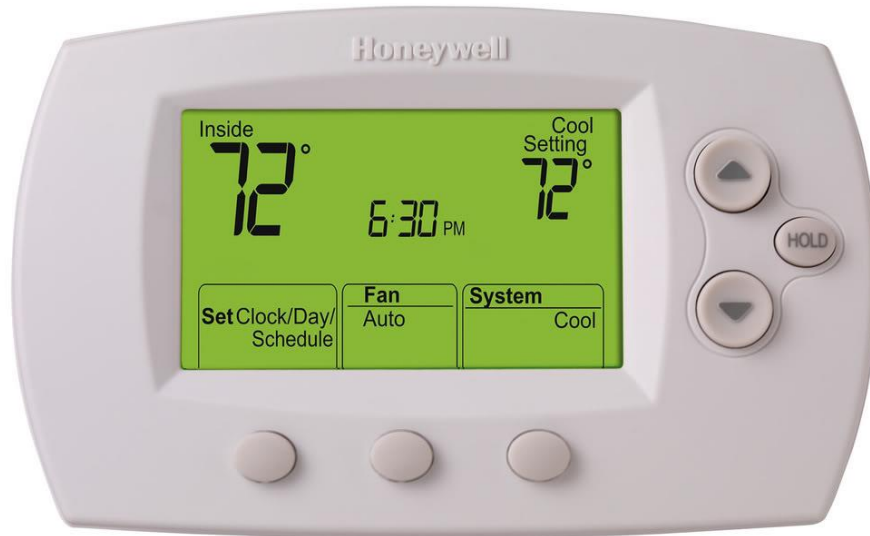
Tools: Social Diffusion

- ❑ Diffusion of innovation through social networks
 - ❑ Agricultural practices
 - ❑ Solar
 - ❑ Drought tolerant landscaping
- ❑ Influenced by networks
 - ❑ Friends, family, coworkers, etc.
- ❑ Behavior must be visible
 - ❑ Combine with commitments from early adopter



Tools: Social Diffusion

- ❑ Those who install programmable thermostats are more likely to influence friends, family, and coworkers to install them, but not neighbors



Tools: Social Diffusion

- ❑ Those who intend to install solar panels have been found to have friends and colleagues who had already installed them



Tools: Prompts

- ❑ Remembering to act
 - ❑ Barrier is forgetting
- ❑ Noticeable
 - ❑ Close in space and time
 - ❑ Combine with other tools
- ❑ Self-Explanatory and Explicit
 - ❑ Ineffective: “Please conserve energy”
 - ❑ Effective “Turn off the light before leaving”

Tools: Prompts



Tools: Prompts


*How to maintain
your tires*



MONTHLY CHECK

Front _____ psi

Rear _____ psi



Funding provided by the California
Integrated Waste Management Board

**1. Find the
correct pressure.**
CORRECT: Pressure is
printed on the drivers
door, glove box, or in
the owners manual.



**2. Check tire
pressure.**
CORRECT: Remove
valve cap, apply
gauge, read pressure.



3. Add air.
CORRECT: If
needed, add air
using a pressure
pump.



Tools: Prompts



Tools: Prompts



Tools: Convenience



Tools: Communication

Capture
attention

Vivid

Personalized

Credible
sources

Simple & clear

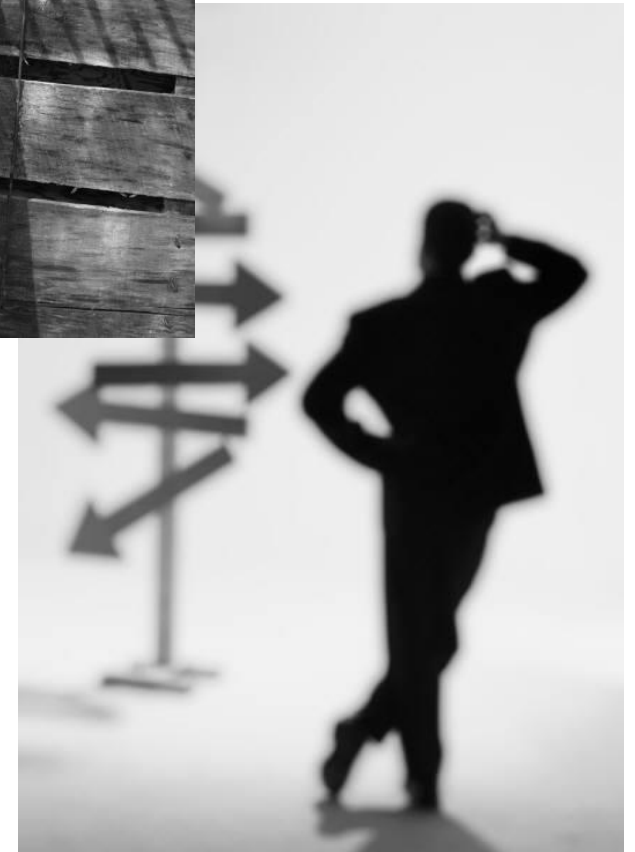
Personal
communication

“..if you were to add up all the cracks around and under these doors here, you’d have the equivalent of a hole the size of a basketball in your living room wall. Think for a moment about all the heat that would escape...”

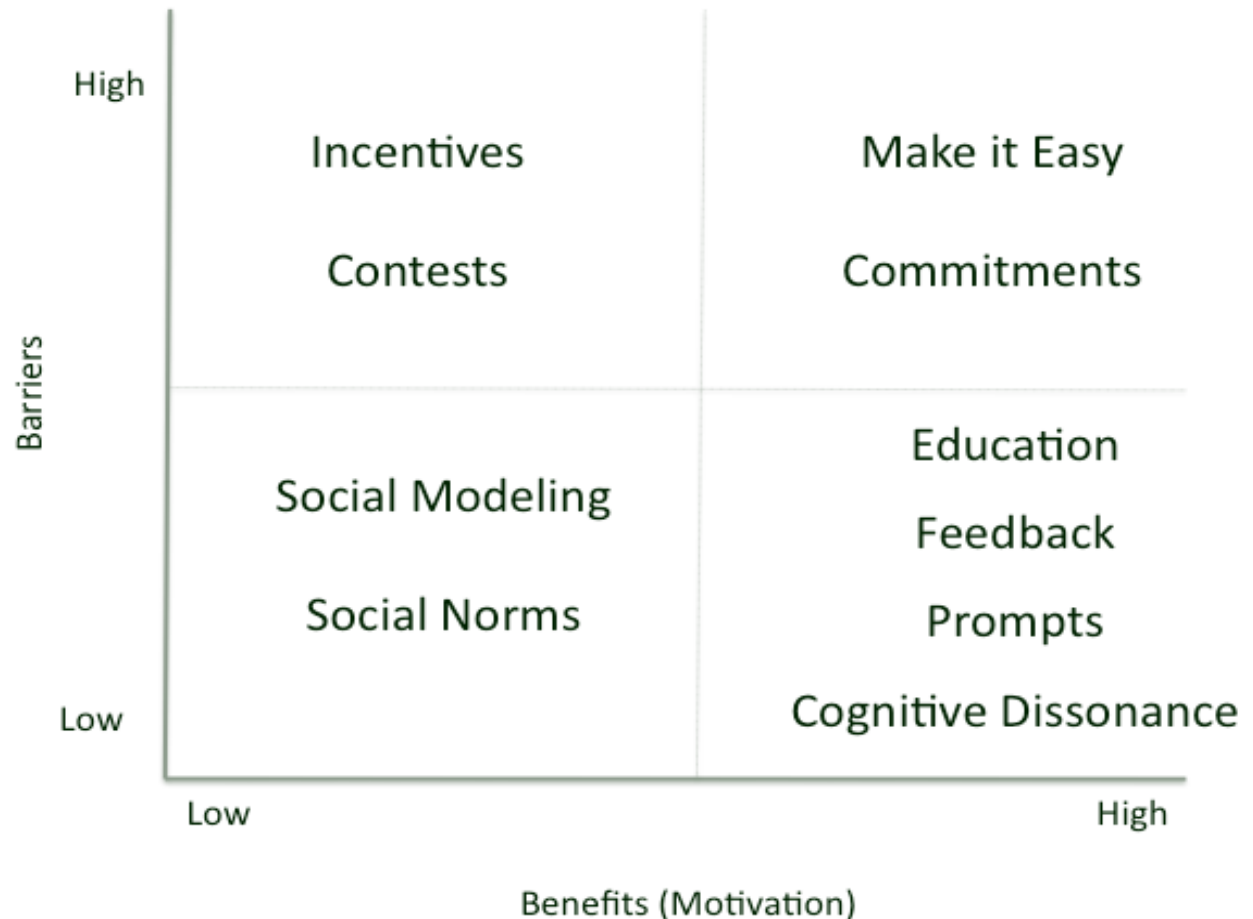
- Cracks are minor....a **hole** is disastrous!



Resources and Planning Tools

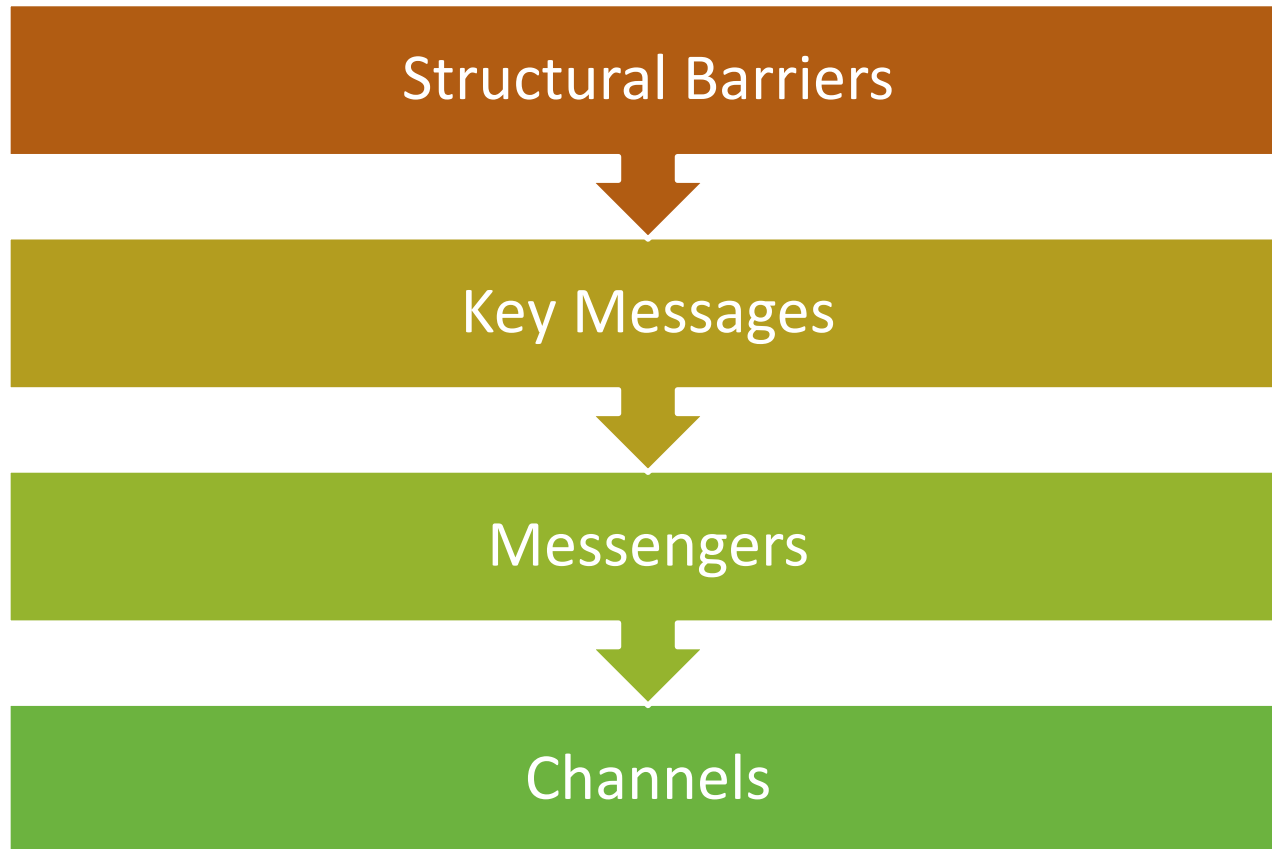


Selecting Tools



Graphic From: Schultz, P. W. (2013). Strategies for promoting proenvironmental behavior: Lots of tools but few instructions. *European Psychologist*.

Design Process



Strategy Table: Computer Shutdown

Research Outcomes		Strategy Element
Barrier: Lack of knowledge about monitor shutdown.	→	Provide Information
Barrier: Perceived long power-up time.	→	Correct Misperceptions
Barrier: Lack of knowledge about presence of policy.	→	Policy/Admin Support
Barrier: Remembering/Knowing to turn off monitor.	→	Prompt and Commitment
Benefit: Saving energy and money.	→	Highlight Benefits

Prompt Card



Cold Water Wash Strategy



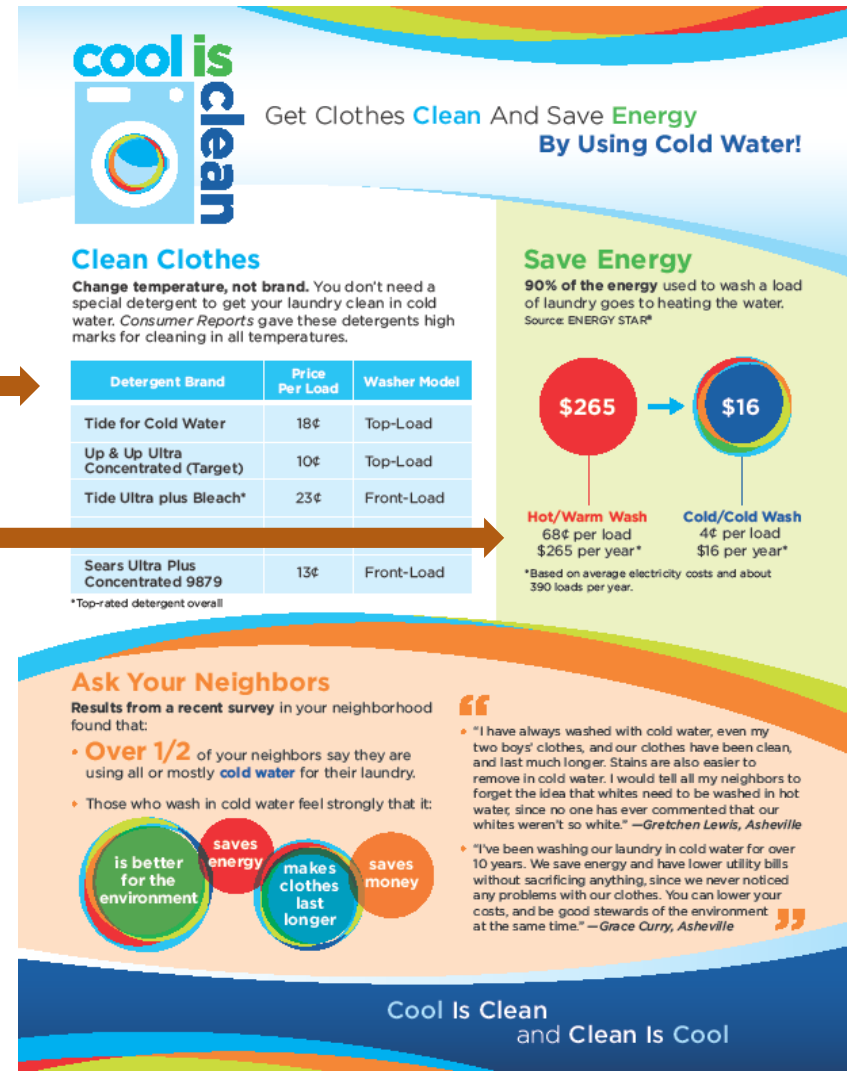
Flyer

- Consumer Reports

- Energy & Money Savings

- Testimonials

- Benefits



Magnet

- Prompt
- Affixed to Machine



CBSM Resources

❑ Fostering Sustainable Behavior

❑ *Doug McKenzie-Mohr*

❑ Case Studies

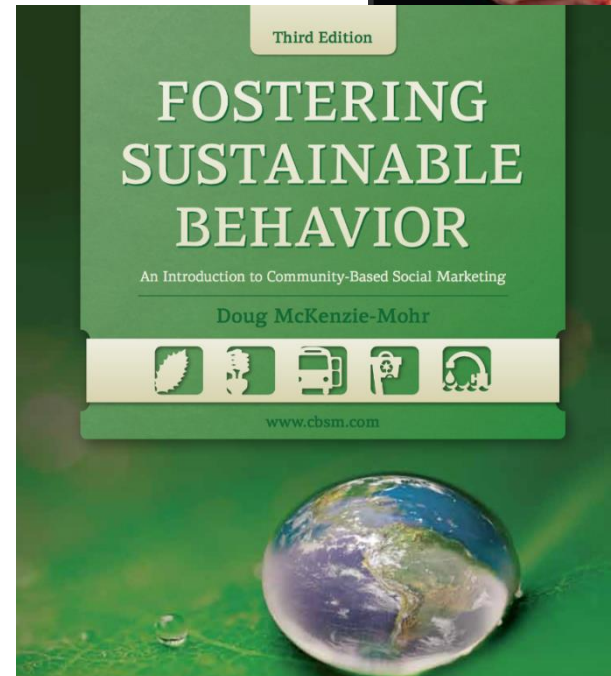
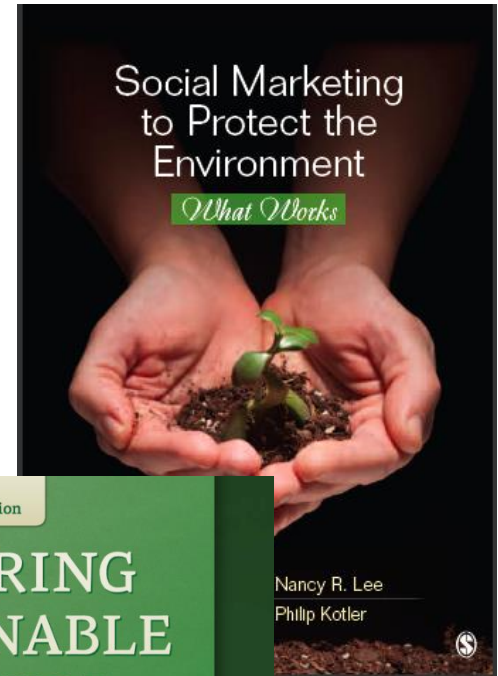
❑ www.cbsm.com

❑ *“What Works”*

❑ USDN Turnkey Strategies

❑ *Cold Water Wash*

❑ *Computer Shutdown*



Tools of Change Website

Welcome, Guest | Login | Register | Français

Tools of Change
Proven Methods for Promoting Health, Safety and Environmental Citizenship

+Planning Guide +Tools of Change +Case Studies +Topic Resources +Webinars & Workshops +About Us

Welcome to the Tools of Change Website

Founded on the principles of community-based social marketing.

Welcome to Tools of Change, the most extensive, freely-accessible collection of voluntary behavior change, social marketing and cbsm case studies available on the web. You'll also find some great planning tools and resources here.

Are you a *Concerned Citizen*? Ask your local government or NGO to consider implementing one or more of the proven approaches highlighted in our [case studies](#). Show your local decision makers it has been done before! To review recent case studies by topic area, see the left hand columns of our [Topic Resources](#) pages.

If you are a *Practitioner*, you'll find on this site specific social marketing tools, case studies, and a planning guide for helping people take actions and adopt habits that promote health, safety and/or sustainability. It will help you include in your programs the best practices of many other programs - practices that have already been successful in changing people's behaviour.

Check out our *Landmark* case studies, which have been selected through a peer selection process that recognizes programs and social marketing approaches considered to be among the most successful, innovative, replicable and adaptable in the world. If you think you will be using the site for more than just a quick visit, we suggest that you [Create an Account](#). Accounts are free, and having one will enable you to view the site with a focus on your particular interest areas, save your work automatically between sessions, and print the plans you create on-line.

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Environment

- Clean Air
- Climate Change
- Energy
- Pollution Prevention
- Transportation
- Waste
- Water

Health Promotion

- Active Living
- AIDS & STBIs
- Environmental Health
- Fitness
- Heart
- Nutrition
- Tobacco

Safety

- Bullying Prevention
- Crime Prevention
- Occupational Health & Safety
- Road Safety

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[Click for Advanced Search »](#)

Introductions for

- + Community Economic Developers
- + Environmental Promoters
- + Health Promoters
- + Safety Professionals
- + Social Marketers
- + Transportation Professionals

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Tools of Change

Proven Methods for Promoting Health, Safety and Environmental Citizenship

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Tools of Change

A job is so much easier with the right tools at hand! These tools offer powerful approaches that can make your programs more successful. Some of these tools provide fundamental ways of motivating people to take the action you wish them to take: Financial Incentives and Disincentives, Norm Appeals, Vivid, Personalized Communication, Feedback, Obtaining a Commitment and Building Motivation Over Time are tools that can help you increase motivation. They can also help overcome barriers and disincentives, such as inertia, information clutter, and feelings of isolation, which would otherwise discourage people from participating in your program.

Methods for overcoming people's forgetfulness are offered in the Tool Prompts. Other particular barriers are addressed in the Tool Overcoming Specific Barriers.

Nuts and Bolts

- [Building Motivation Over Time](#)
- [Feedback](#)
- [Financial Incentives and Disincentives](#)
- [Norm Appeals](#)
- [Obtaining a Commitment](#)
- [Overcoming Specific Barriers](#)
- [Prompts](#)
- [Vivid, Personalized, Credible, Empowering Communication](#)

Multifaceted Approaches

- [Home Visits](#)
- [Mass Media](#)
- [Neighbourhood Coaches and Block Leaders](#)
- [Peer Support Groups](#)
- [School Programs that Involve the Family](#)



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Obtaining a Commitment

What is this Tool?

- Asking for a person's pledge or agreement to carry out the actions you are promoting, such as requesting that a person sign a statement or say a few words indicating his or her intentions.
- A key element of social learning theory
(http://rex.nci.nih.gov/NCI_Pub_Interface/Theory_at_glance/HOME.html)

Why Would You Use It?

- Because people who have committed to an activity are more likely to do it. They are also more likely to agree to a subsequent, more demanding, activity.

When Would You Use It?

- Ask for a commitment once you have established that the person is interested in doing the activity.

How Would You Use It?

My Plans: [Login to Save Plans](#)

1. Establish that the person is interested in doing the activity.

Examples

ReCAP's Home Advisors asked residents to accompany them as they conducted their home audits. They observed any reactions at each stage of the process, and involved residents in drawing up a list of repair/retrofit priorities at the end of the visit.

The ABC / Count Me In! programs led participants

Your Program

How will you assess whether people are motivated to do the activity?



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Q & A

Feasibility
Challenges/Concerns

Post-Webinar Survey

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

Action Research

California: 3630 Ocean Ranch Blvd. | Oceanside, CA 92056

New York: 13 East 37th St., Suite 7F | New York, NY 10016

phone: 760.722.4000 | **email:** info@action3630.com

www.action3630.com

