Environmental Social Marketing Resources from

# Tools of Change

World Non-Profit and Social
Marketing Conference April, 2011

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Tools of Change

## Agenda

## Agenda

- Theoretical Framework
- Topic Resource Pages
- Case Studies, *Landmark* designation
- Tools and Planning Guides
- Webinars, video recordings, transcripts
- Feedback / What would you like to see?

# Theoretical Framework

## Community-Based Social Marketing

- Term coined by Doug McKenzie Mohr PhD
- Co-author of *Tools of Change* workbook



## Community-Based Social Marketing

- E*mphasizes direct contact* among community members and the removal of structural *barriers*
- Uses a set of proven, synergistic *tools*

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# Tools of Change

Proven Methods for Promoting Health, Safety and Environmental Citizenship

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## Introduction to Community-Based Social Marketing

by: Doug McKenzie-Mohr
St. Thomas University

A healthy sustainable community is in large part the result of each of its members. When members of a community adopt healthy habits - by getting more exercise, for example - the community becomes a healthier one. When the members use resources wisely - by recycling, for example - the community moves towards sustainability. When community members pollute less, the community becomes both healthier and more sustainable. Therefore, to promote a healthier, more sustainable future, it is essential to know how to encourage individuals to adopt corresponding lifestyles.

Increasingly, those who develop and deliver programs to promote health and sustainability are turning to community-based social marketing for assistance. Community-based social marketing emphasizes direct contact among community members and the removal of structural barriers, since research suggests that such approaches are often most likely to bring about behaviour change.

Community-based social marketing also uses a set of "tools" which have been identified as being particularly effective in fostering such change. While each of these tools on its own is capable of promoting healthy and/or sustainable behaviour under the right conditions, the tools are most effective when used together.

Community-based social marketing is pragmatic. It involves:

- identifying the barriers to a behaviour
- developing and piloting a program to overcome these barriers
- implementing the program across a community
- evaluating the effectiveness of the program

To promote healthy, sustainable lifestyles effectively, the barriers to healthy, sustainable activities must first be identified. Community-based social marketers therefore begin by conducting the research that will help them identify these barriers.

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Introductions for

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

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# Topic Resources

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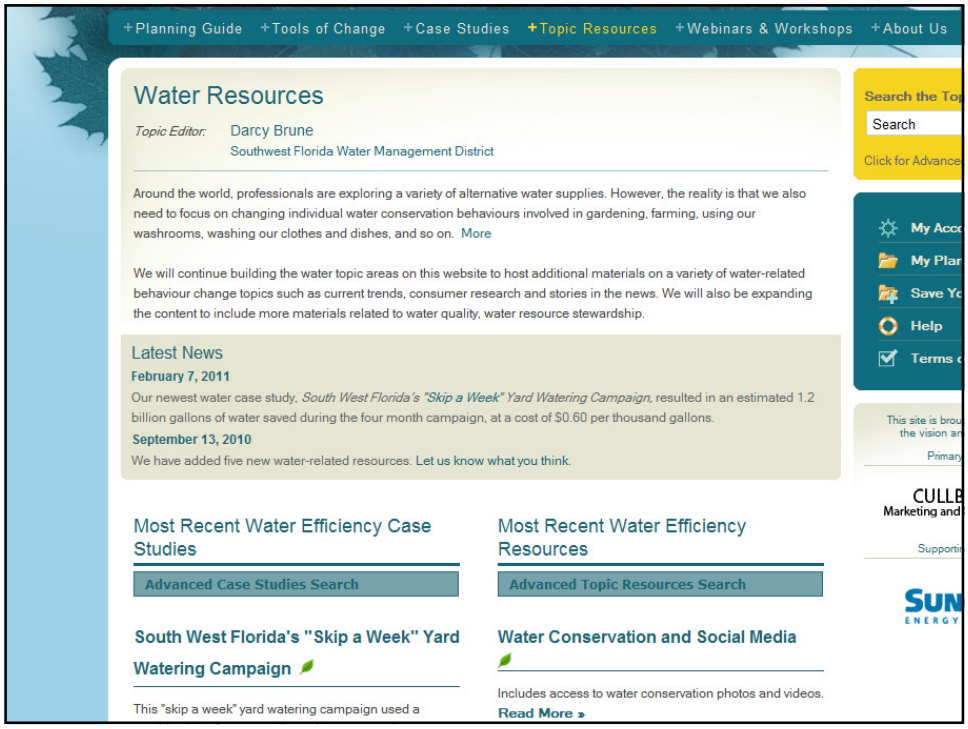
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Topic Editor: Darcy Brune
Southwest Florida Water Management District
Around the world, professionals are exploring a variety of alternative water supplies. However, the reality is that we also need to focus on changing individual water conservation behaviours involved in gardening, farming, using our washrooms, washing our clothes and dishes, and so on. More
We will continue building the water topic areas on this website to host additional materials on a variety of water-related behaviour change topics such as current trends, consumer research and stories in the news. We will also be expanding the content to include more materials related to water quality, water resource stewardship.
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February 7, 2011
Our newest water case study, South West Florida's "Skip a Week" Yard Watering Campaign, resulted in an estimated 1.2 billion gallons of water saved during the four month campaign, at a cost of $0.60 per thousand gallons.
September 13, 2010
We have added five new water-related resources. Let us know what you think.
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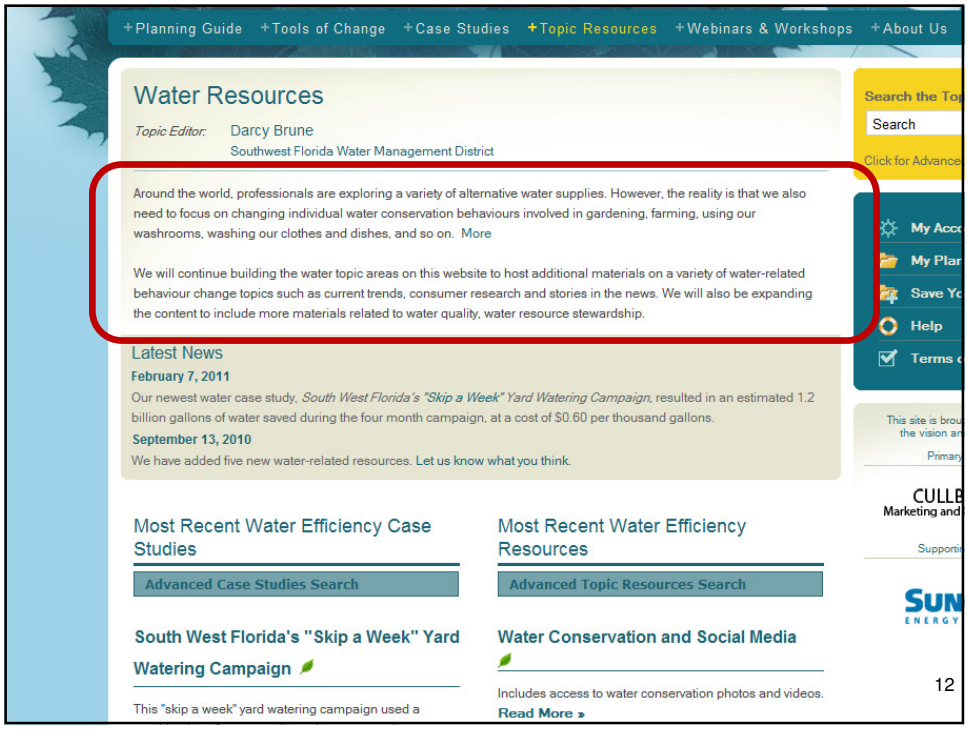
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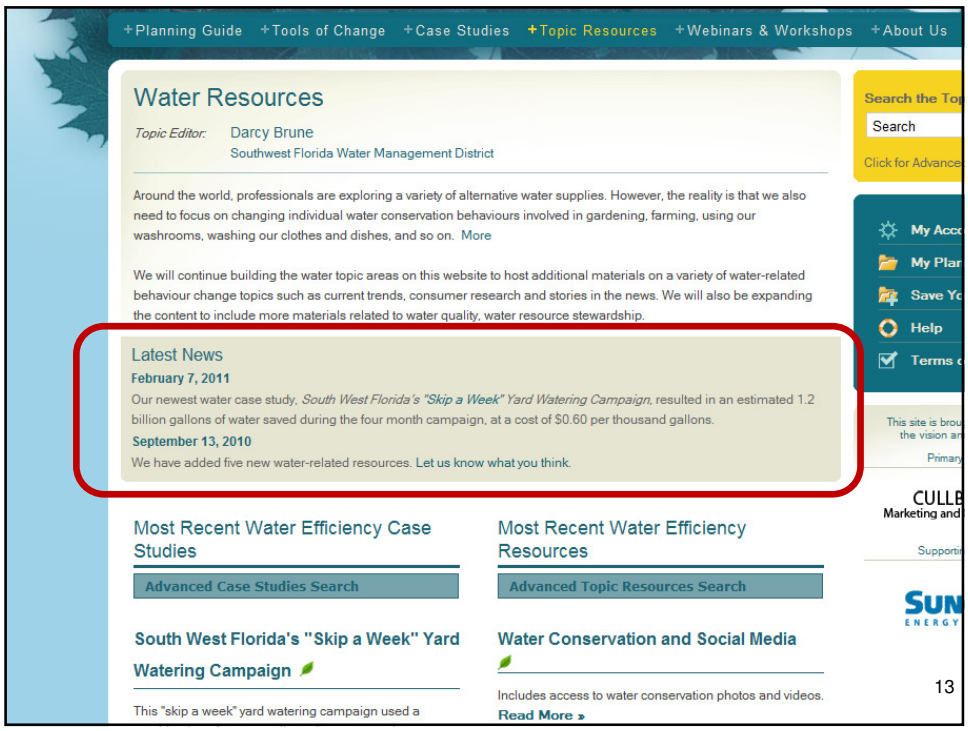
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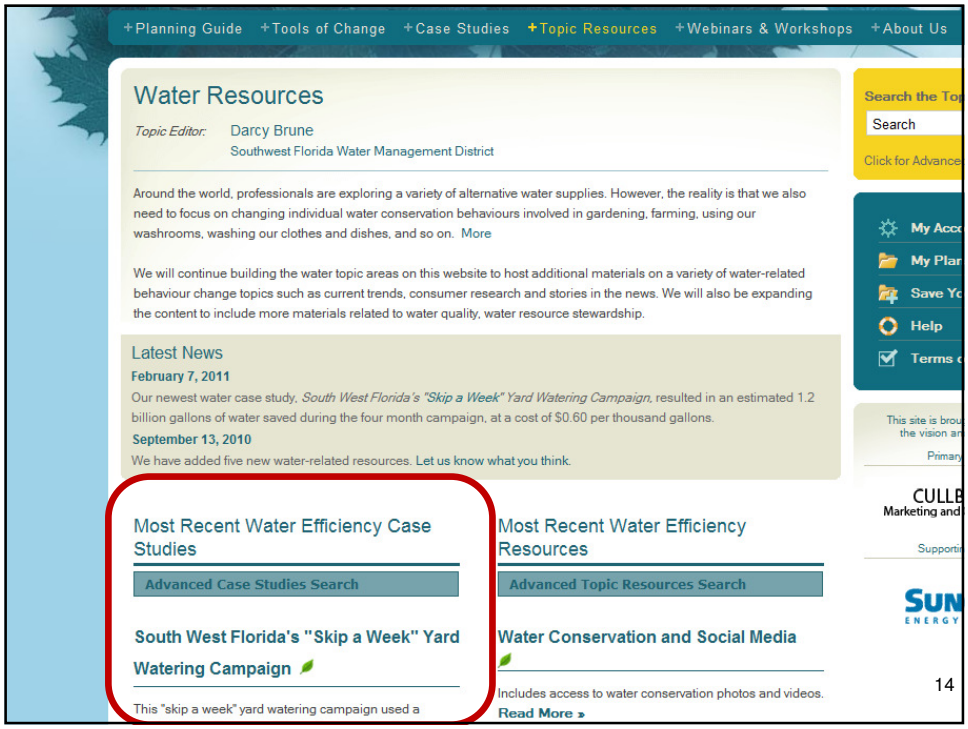
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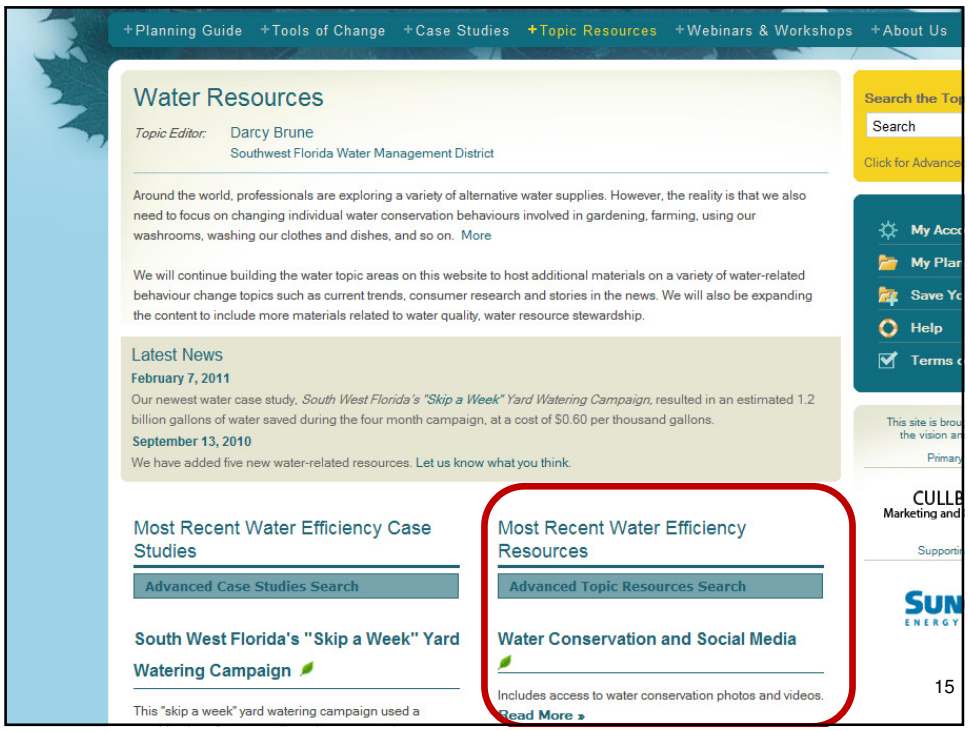

Topic Resources

# Resource Types

- Consumer research
- Strategies and interventions
- Promotional materials
- Training and toolkits

# Case Studies

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Tools Used

- Building Motivation Over Time
- Financial Incentives and Disincentives
- Norm Appeals
- Obtaining a Commitment
- Overcoming Specific Barriers
- Mass Media
- Word of mouth

Initiated By

TransLink

Partners

- Business Community
- Municipalities
- Schools
- NGOs

Results

Employer Pass Program

- Drive-alone trips by participants dropped by 14%

TravelSmart Individualized

## TransLink's TravelSmart Program

TransLink's TravelSmart program helps businesses and residents of Metro Vancouver make smart travel choices and reduce the number of trips made by driving alone. It includes an Employer Pass Program, ridesharing, car share (including corporate car share), active transportation, parking management, guaranteed ride home, and telework, all supported by strong promotion. This case study also reports on TransLink's individualized marketing pilot, which was designated Landmark status in 2008.

### Background

*Note: To minimize site maintenance costs, all case studies on this site are written in the past tense, even if they are ongoing - as is the case with this particular program. This case study was written in June 2010*

TransLink's TravelSmart program was first developed and refined as an in-house program and rolled out to other employers in the region. TravelSmart evolved from the Greater Vancouver Regional District's Employee Trip Reduction Program (1996) and replaced the *OnBoard* program (in 2009).

### Getting Informed

Employee surveys and other market research found that two critical factors motivated people to take a particular travel mode, or influenced them to try another: time and money - with time being the most important. While environmental concerns were important, they were not strong enough on their own to change driving behaviours.

### Delivering the Program

The TravelSmart program included promotion and delivery of a variety of initiatives.

1. The **Employer Pass Program** discounted annual transit passes by

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## Delivering the Program

The TravelSmart program included promotion and delivery of a variety of initiatives.

1. The **Employer Pass Program** discounted annual transit passes by approximately 15% for employees of participating companies. Payment for the pass was facilitated through payroll deduction by the employer. Employers often chose to provide an additional subsidy for employees. Heavily discounted transit passes helped participating employers attract new hires, while demonstrating commitment to corporate environmental responsibility (Financial Incentives and Disincentives).

The pass was valid for travel throughout the year, and pass holders could travel on transit with an additional five family members (1 adult and 4 children) on Sundays and statutory holidays with their employer pass, at no extra charge.

It was generally the Employer Pass Program that got TransLink 'in the door' at each worksite - whether or not TransLink approached the employer or was contacted by the company or its employees (Building Motivation Over Time).

## Financing the Program

The original **Road Crew** project was funded by the National Highway Traffic Safety Administration, with additional support from the Wisconsin Department of Transportation.

Communities were eligible to receive up to $37,500 under the terms of the WisDOT/BOTS grant to cover expenses for up to 18 months. Unspent funds from the aborted Manitowoc County efforts were allocated to the remaining grant recipients. Dodge-Point and Polk County received additional grants of $10,750 each to help sustain their efforts and help defray the higher-than-expected costs that were incurred to maintain the vehicles. Tomah, while eligible, did not apply for additional funding. This increased the total grant amount for Dodge-Point and Polk County to $48,250.

The direct funds allocated to the three communities included the grant awards, the fare collections for rides, community fund raising, and payments made to staff for time committed to community work (as opposed to research and other non-direct community work). The total of these funds was about $230,000

Funding was used for ride reimbursement, promotion and advertising, leasing vehicles, office supplies, phone and equipment, liability insurance, and community coordinator salaries. Monies were not used for office equipment and furnishings, or for the purchase of vehicles.

## Measuring Achievements

Measurement Methods included trip diaries, surveys, *TransLink Listens* (a web portal for customer comments), ride-share statistics, and updates from car sharing companies on new clients.

## Results

- Employees who joined the Employer Pass Program (22,000 in total in 2010) reduced their number of drive-alone trips by an average of 14%.
- During the TravelSmart individualized marketing pilot, the use of sustainable modes of transportation increased substantially. Among program participants, walking and the use of public transportation increased by 9% and 12%, respectively, while bicycling showed an even bigger increase of 33%. Trips made by driving alone dropped by 8%.
- TransLink's Ride-Share Week in 2009 resulted in:

## Contacts

travelsmart@translink.ca
(604) 216 - 3299
www.translink.ca

## Notes

Key factors related to behaviour change:

- Time and money were the main motivators
- Geting information out using a variety of media
- Getting support of employers - tying into business objectives/company philosophy, and relationship management with employers/businesses
- Providing a good product and continuing to improve transit service levels
- Having consistent messaging under the TravelSmart brand

TravelSmart's initiatives were driven by TransLink's Transport 2040 Goals for the entire region, including the following:

## Landmark Case Studies

Designation recognizes programs and social marketing approaches considered to be among the most successful in North America



**Rated by a peer-selection panel based on:**

- Impact
- Innovation
- Replicability
- Adaptability

## Peer Selection Panel
## Home / Building Energy

- Melissa Klein, US EPA's ENERGY STAR Program
- Arien Korteland, BC Hydro
- Clifford Maynes, Green Communities Canada
- Stephanie Thorson, Summerhill
- Edward Vine, Lawrence Berkeley National Laboratory
- Dan York, ACEEE



## Peer Selection Panel
## Transportation

- Chuck Wilsker, U.S. Telework Coalition
- Daniel Coldrey, Transport Canada
- Elizabeth Allingham, Federation of Canadian Municipalities
- Geoff Noxon, Noxon and Associates
- Jacky Kennedy, Green Communities Canada
- JoaAnn Woodhall, Translink
- Lorenzo Mele, Town of Markham
- Ryan Lanyon, Smart Commute

## Landmark Case Studies

**Highlights Webinar**

- Video recording
- Slides / handouts
- Transcripts
- Full case write-up

# Tools of Change, Planning Guide

Tools of Change

Proven Methods for Promoting Health, Safety and Environmental Citizenship

+ Home + Planning Guide + Tools of Change + Case Studies + Topic Resources + Webinars

## 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



Tools of Change

Proven Methods for Promoting Health, Safety and Environmental Citizenship

+ Planning Guide + Tools of Change + Case Studies + Topic Resources + Webinars & Workshop

## Norm Appeals

### What is this Tool?

Norm appeals are ways of making group standards more apparent. The norm appeals in this section all do this in a similar manner. They make it more likely that people will observe others doing the activity you are promoting and are a key element of social learning theory (http://rex.nci.nih.gov/NCI_Pub_Interface/Theory_at_glance/HOME.html)

For example, the size and colour of the Blue Box and the fact that it is put out at the curb has helped people see that others in their community are recycling. Similarly, peer support groups can help participants witness each other making changes. Public commitments (see the Tool Obtaining a Commitment) are observable by others by definition.

### Why Would You Use It?

People often decide what attitudes and actions are appropriate from observing those around them. This kind of influence can have long-lasting effects.

### When Would You Use It?

Design norm appeals into your programs at all stages, from program planning to feedback, as described below.

### How Would You Use It?

My Plans: Login to Save Plans

## How Would You Use It?

My Plans: Login to Save Plans

### 1. Design the activity itself to be as visible as possible.

**Examples**

Guelph 2000 had residents stake the spot on their properties where their shade trees would be planted. The stakes were painted bright green and had the name Guelph 2000 marked on them.

Aarhus Bike Busters held an opening ceremony on Town Square, where participants were given their bicycles. They all rode an inaugural lap of the town, making the project a visible public event.

**Your Program**

How can you make the activity as visible as possible?

### 2. Provide additional "markers" of participation.

**Examples**

Quinte Regional Recycling put stickers on participants' Blue Boxes that read: "We Compost Too."

Earth-Works provided participating business establishments with door stickers advertising that they were active composters. This helped to reinforce composting as a community activity. They also provided

**Your Program**

How might you make use of the following?

Decals:

Lawn, garden or window signs:


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Lawn, garden or window signs:

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

## Introduction to the Planning Guide

Planning - arguably the most important stage of any program - is often neglected in the rush of day-to-day demands. Therefore, we've designed this guide to help you plan. The process has been broken down into seven sections, each with step-by-step instructions, plenty of examples, and space for you to plan your own program.

A human guide shares his or her experience but is not in charge of the expedition. So it is with this Planning Guide. It suggests approaches or maps pathways charted by the Case Studies. Each reader will have unique "travel preferences" and will face different circumstances. Consider the instructions as guidelines - well tested and dependable, but not inflexible.

Login to save plans

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|---|---|---|---|---|---|---|
| Setting Objectives | Developing partners | Getting Informed | Targeting the Audience | Choosing the Tools of Change | Financing the program | Measuring Achievements |

# Webinars, Recordings, Transcripts



## Dozens of Social Marketing Webinars each year:

*Highlights Series*

- Home / building energy cases
- Sustainable transportation cases

*Instructional Series*

- Social marketing instruction and review

*Others*

- FCM, Transport Canada, Health Canada

Webinars

# Dozens of Social Marketing Webinars

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## Feedback
## What Would You Like To See?

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