

Getting Connected...

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 - Make sure your speakers are **off** or there will be an echo.
 - To merge your name with your phone number on the list:
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Community-Based Social Marketing

SSDN Education to Execution Workshop Series



Webinar #4: Piloting and Evaluation

April 25, 2016

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

Pilot Testing and Evaluation (40 min)

- Basic Principles
- Research Designs
- Metrics
- Return on Investment

Conclusions (10 min)

- Broad Scale Implementation
- Dissemination

Q&A (30 min)

- Implementation Plans
- Challenges/Concerns

Introductions

SSDN: Housekeeping & Announcements

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];
```

The diagram illustrates a five-step process for Community-Based Social Marketing. Each step is represented by a colored rectangular box, with arrows pointing downwards from one box to the next, indicating a sequential flow. The steps are: 1. Select Behavior (green box), 2. Barriers & Benefits (brown box), 3. Develop Strategy (gold box), 4. Pilot Test (grey box), and 5. Implement Broadly & Evaluate (black box).

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*
- **Apr: Pilot Testing and Evaluation**
 - *Identifying Metrics, Design, Analysis, ROI*
- **Troubleshooting, Lessons Learned, Scaling Up**
 - *Peer Learning Discussion*

Pilot Testing and Evaluation

Basic Principles
Research Designs



Step 4: Pilot Testing

- Preliminary data about the efficacy of the intervention
 - Identify and address problems
 - Test program variations
 - Cost-savings mechanism
 - Evaluate ROI
 - Typically short-term

Step 4: Pilot Testing

□ Key terms

- Random assignment
 - Equal likelihood of being in any one condition
- Baseline data
- Treatment group/Intervention group
- Control group

Step 4: Pilot Testing

- Research designs
 - One Shot Case Study
 - One Group Pre-Test/Post-Test Design
 - Static Group Comparison
 - Pre-Test/Post-Test Control Group Design

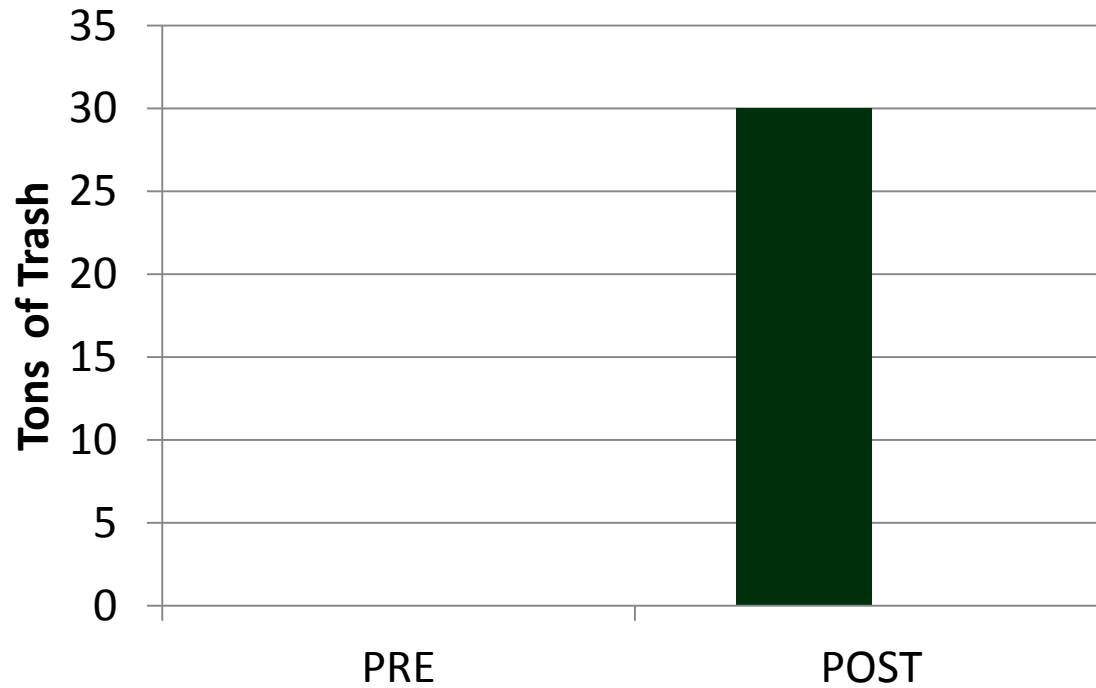
One Shot Case Study



- *Cannot determine change*
- *No baseline measurement*

AVOID

One Shot Case Study



AVOID

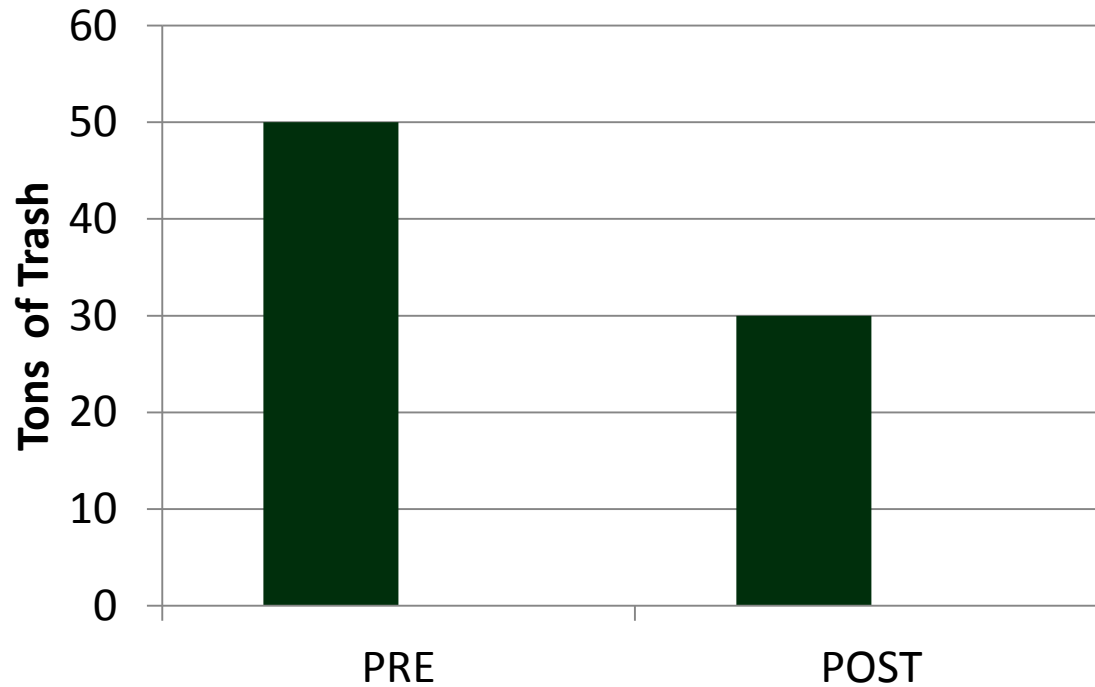
One Group Pre-Test/Post-Test Design



- *History effects*
- *Maturation effects*

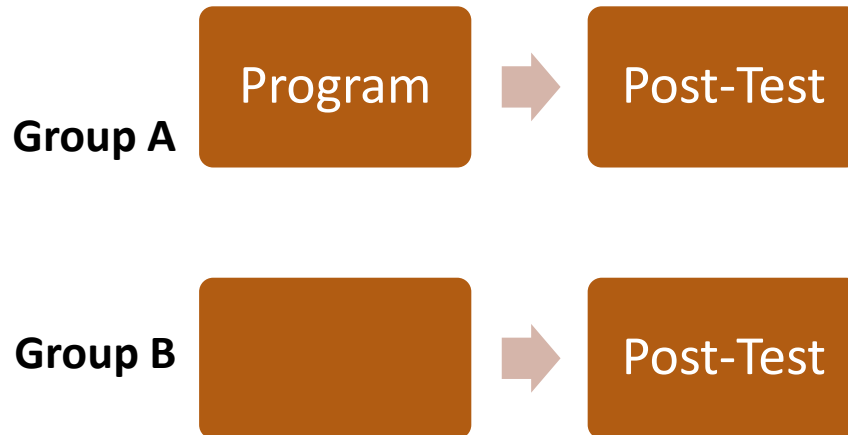
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One Group Pre-Test/Post-Test Design



AVOID

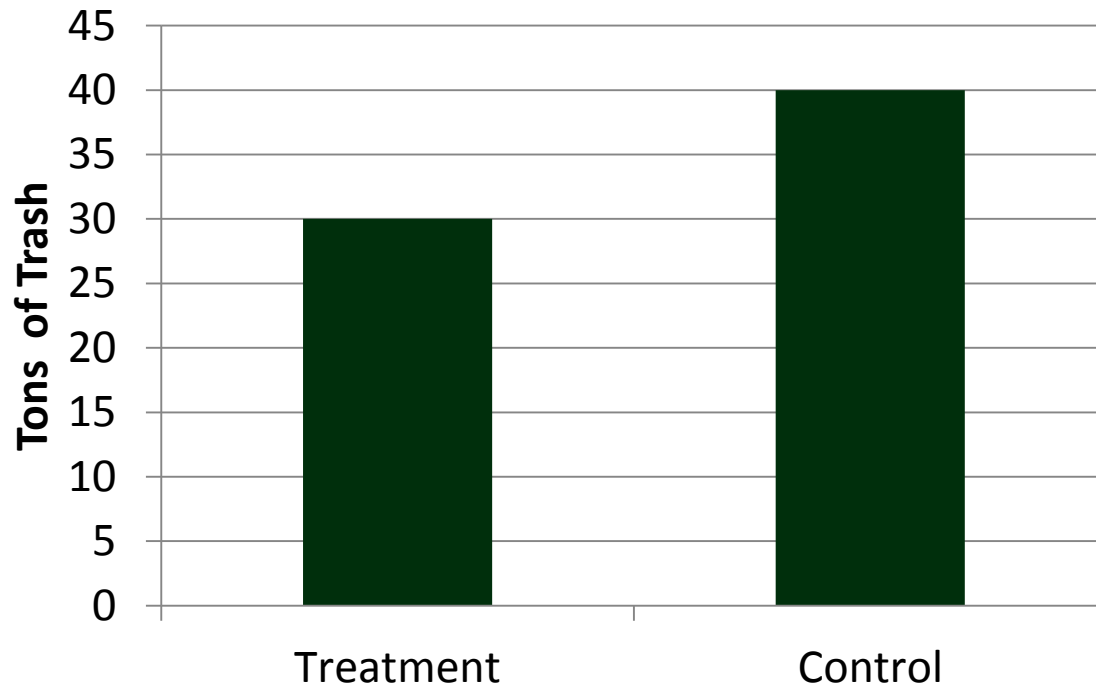
Static Group Comparison



- *No baseline*
- *Pre-existing differences*

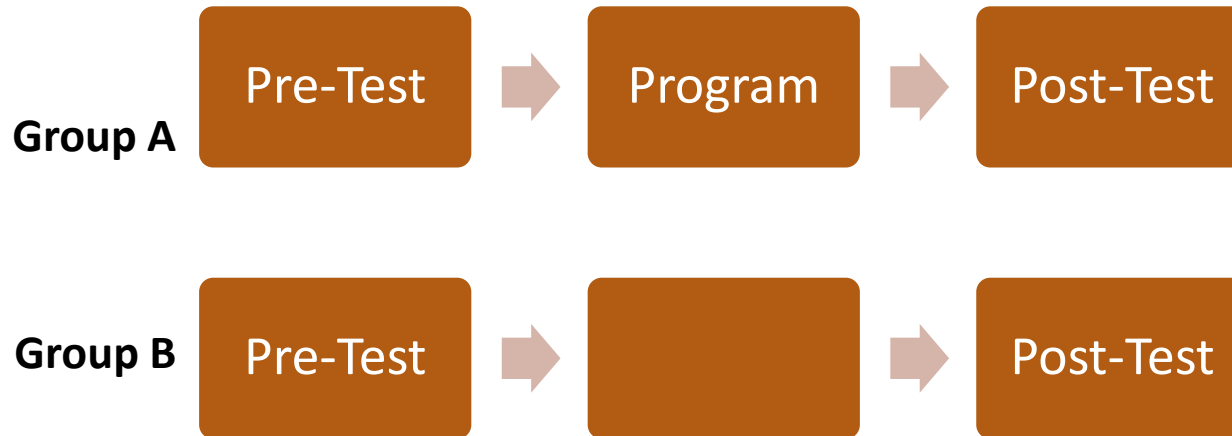
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Static Group Comparison



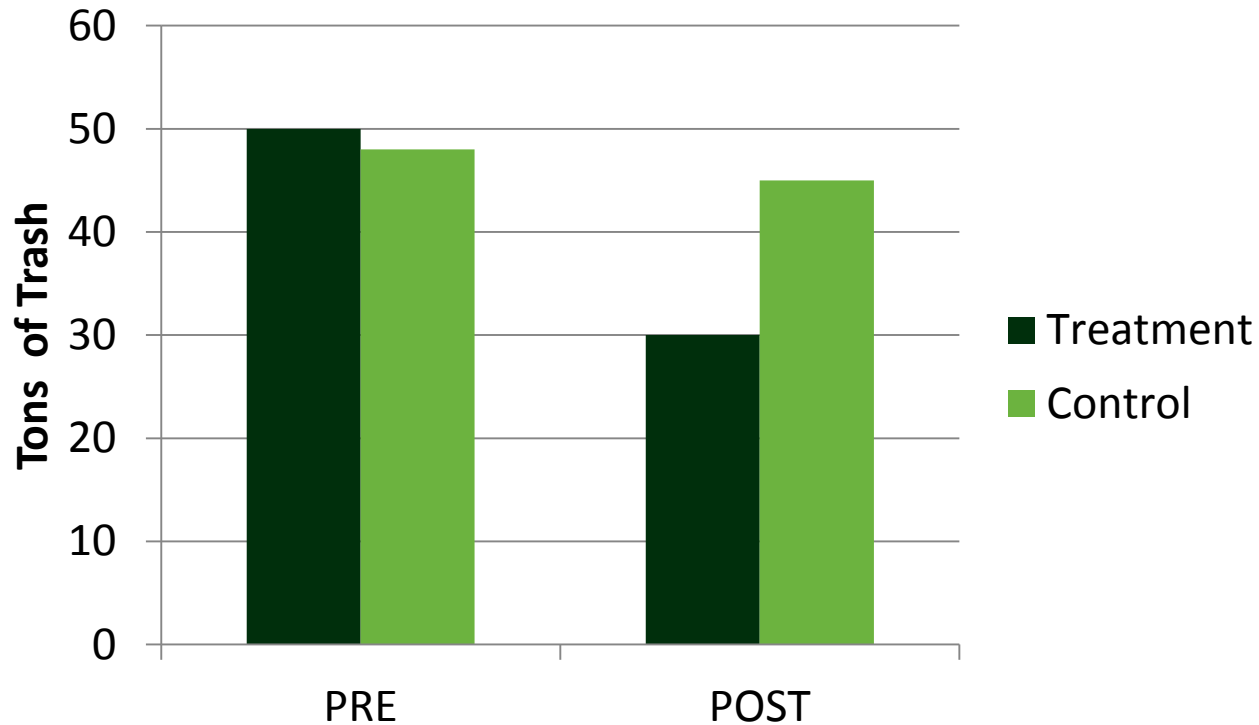
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Pre-Test/Post-Test Control Group Design

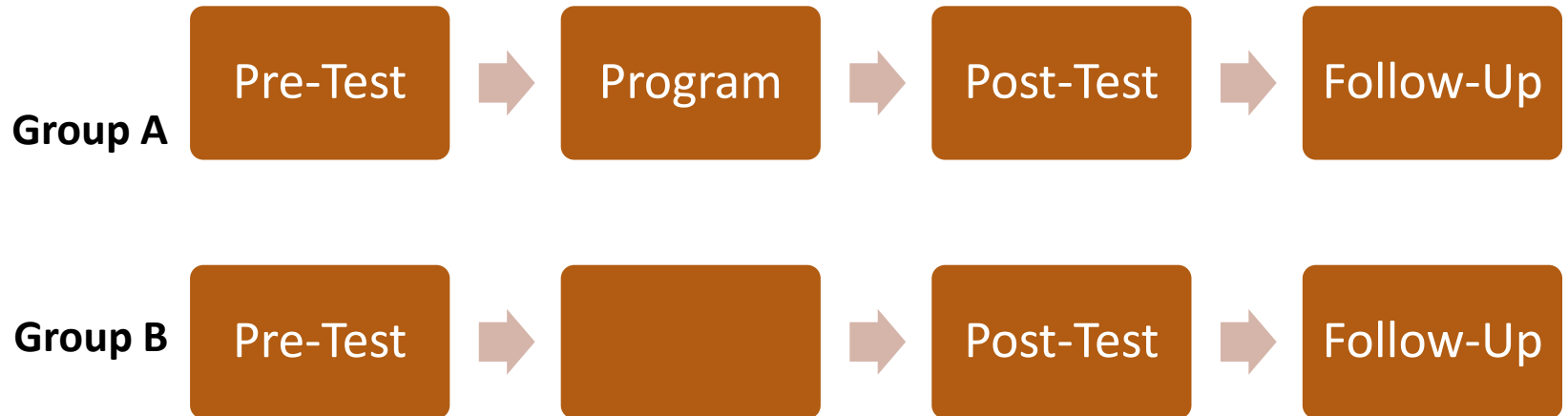


- *Random assignment to groups*

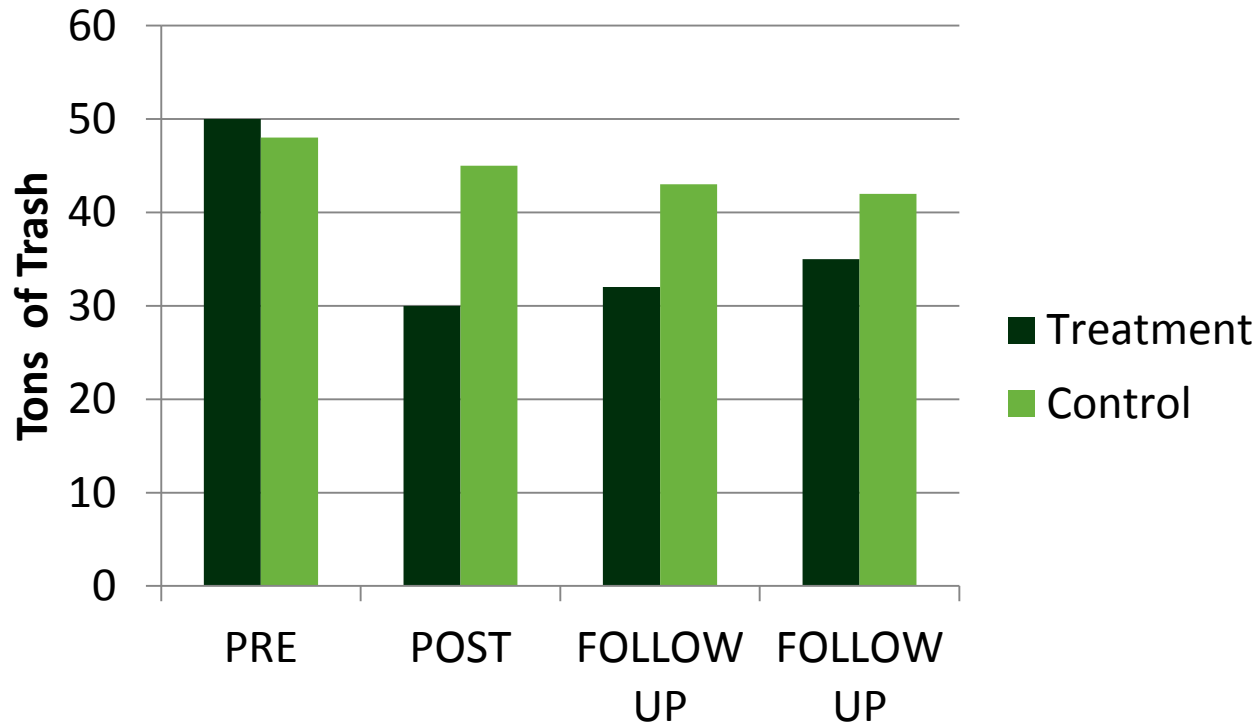
Pre-Test/Post-Test Control Group Design



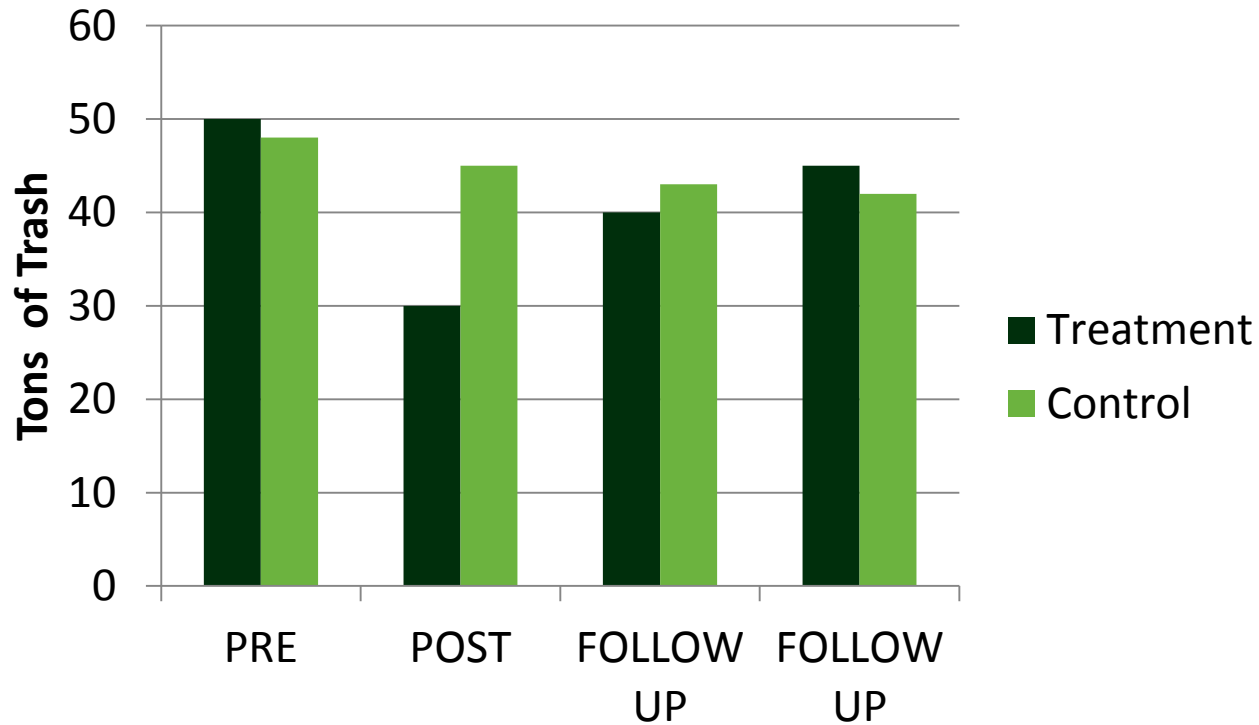
Include Follow-Ups



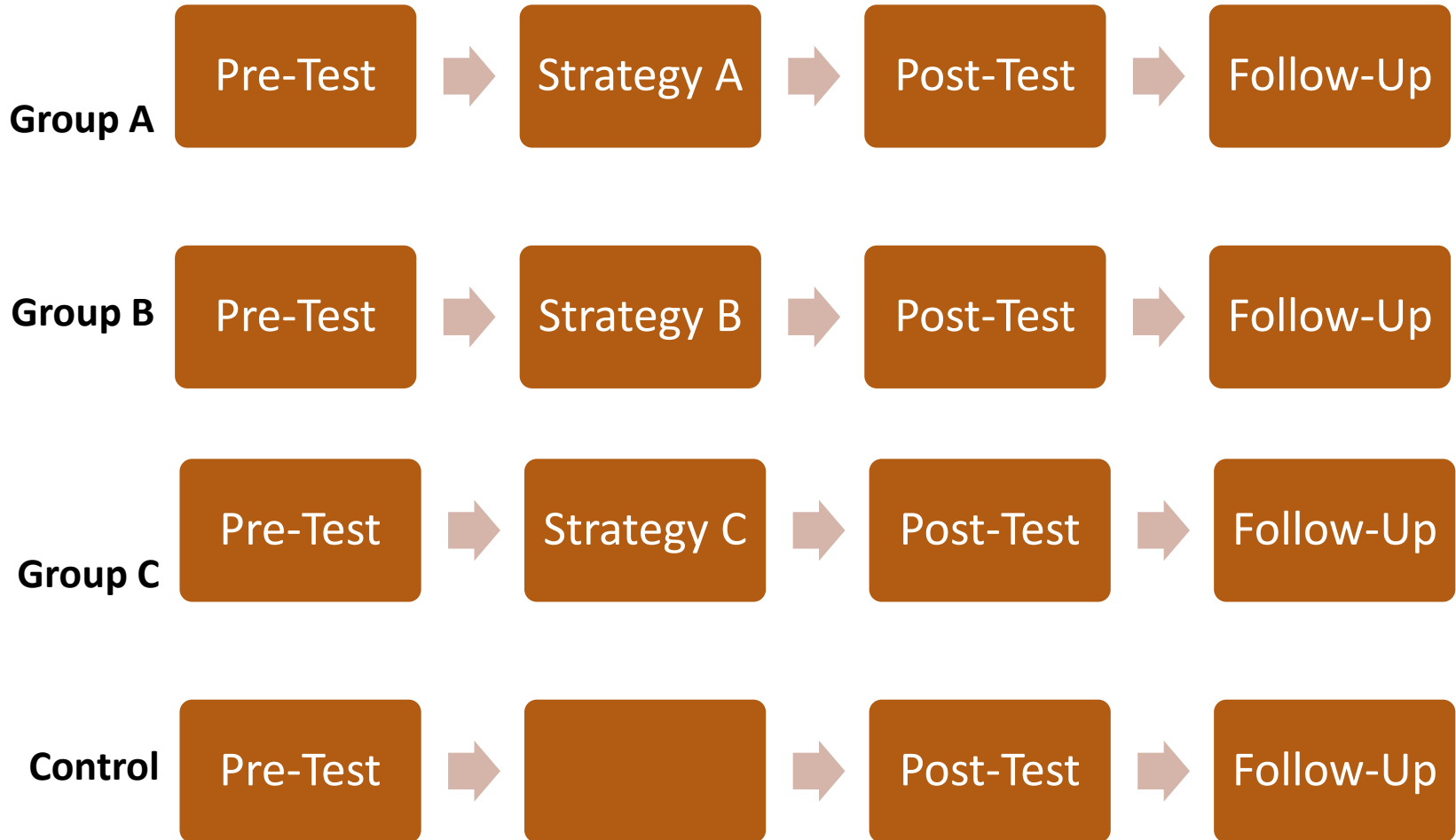
Include Follow-Ups



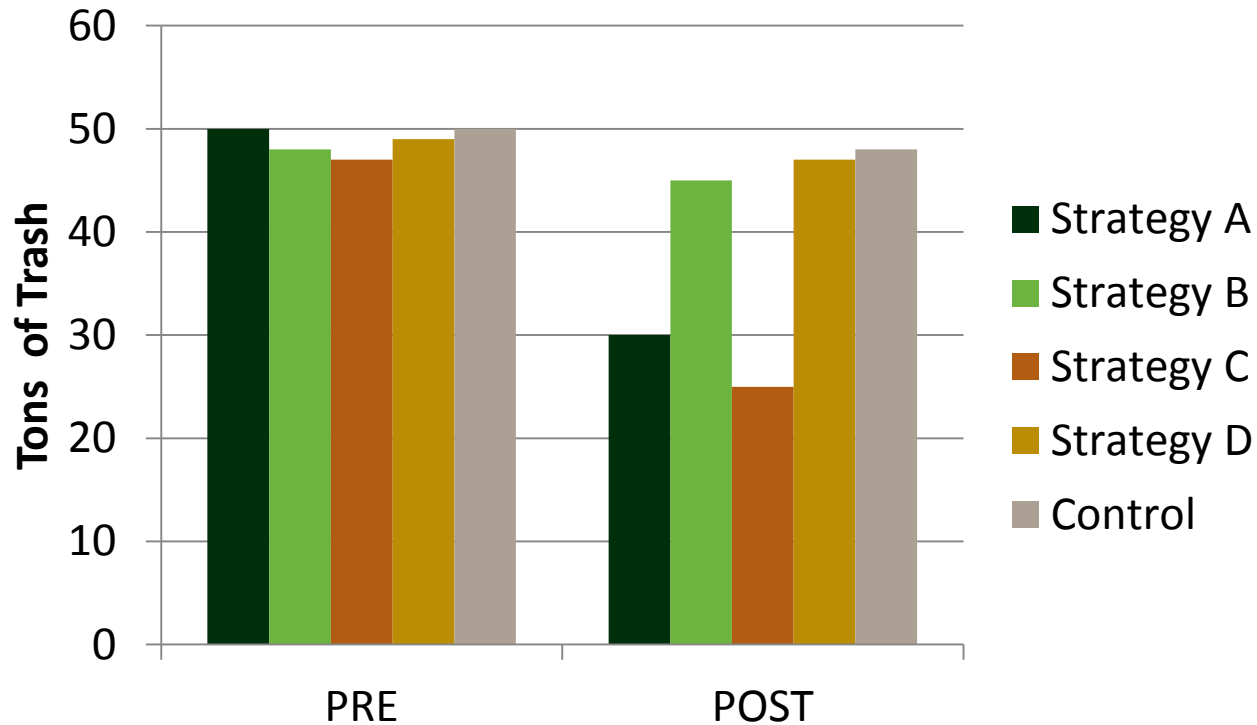
Include Follow-Ups



Test Multiple Variations



Test Multiple Variations



Step 4: Pilot Testing

□ Choosing Metrics

□ Survey Data

- Self report bias

□ Observational data

- Unobtrusive

□ Triangulation

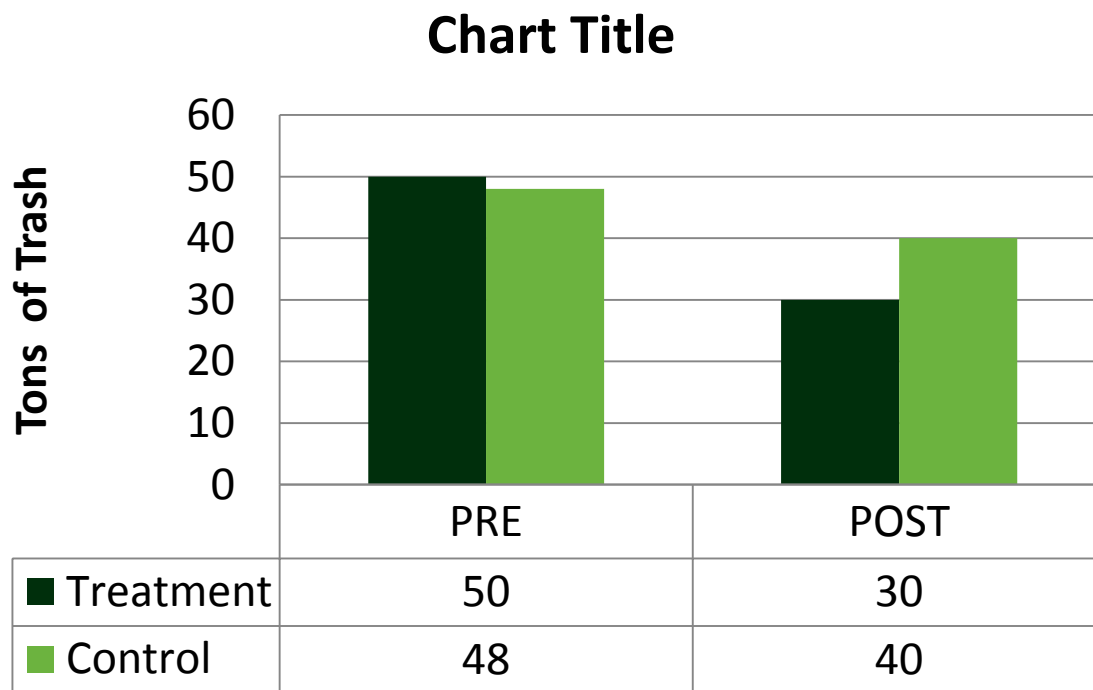
- Multiple sources

□ Use built-in data where possible

- Existing records

Step 4: Pilot Testing

Assessing Actual Impact



Treatment
 $50 - 30 = 20$ tons

Control
 $48 - 40 = 8$ tons

Real Impact
 $20 - 8 = 12$ tons

25% decrease

Step 4: Pilot Testing

- Calculating Return on Investment (ROI)

Cost per behavior change (A/B)

- A = dollars spent
- B = behaviors influenced

Program X = \$45,000

Program Y = \$25,000

Program X = 12% change (12,000 people)

Program Y = 8% change (8,000 people)

Program X ROI = \$ 3.75

Program Y ROI = \$ 3.13

Step 4: Pilot Testing

□ Calculating Return on Investment (ROI)

Economic value of the behavior change

- A = dollars spent
- B = behaviors influenced
- C = cost per behavior influenced (A/B)
- D = benefit per behavior (costs avoided, e.g., tipping fees)

Step 1: Gross Economic Benefit = (B * D)

Step 2: Net Benefit = Gross Economic Benefit – A

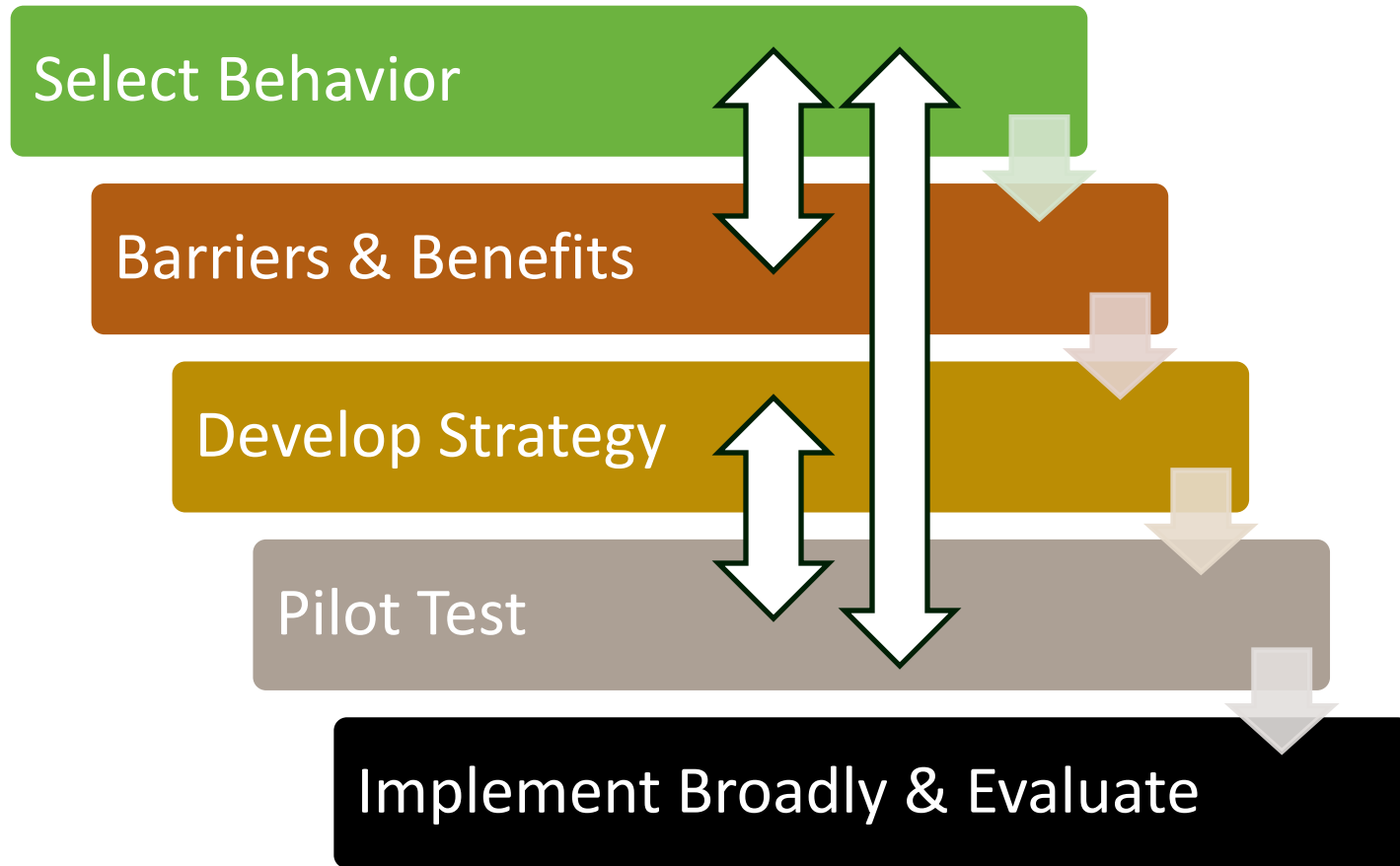
Step 3: ROI = (Net Benefit/A) * 100

150 lattes * \$5 fees avoided = \$750 GEB

Net Benefit = \$750 GEB - \$100 program cost = \$700

ROI = ($\$700/\100)*100 = 700%

Step 4: Pilot Testing



Summary of Key Principles

- ❑ **Do not mix barrier/benefit research with piloting**
- ❑ **Use a minimum of two groups**
- ❑ **Use random assignment**
- ❑ **Prioritize measurements of behavior change**
- ❑ **Calculate return on investment**
- ❑ **Revise pilot until it is effective**

Conclusions

Broad Scale Implementation
Beyond the Pilot

Broad Scale Implementation

❑ Ongoing evaluation

- ❑ Measure persistence of behavior change
- ❑ Adapt and adjust
- ❑ Provide feedback
- ❑ Establish need for ongoing support
- ❑ Justify existence of program

❑ Advertising and media

- ❑ Not feasible in pilot stage
- ❑ Opportunities for feedback

Get the Word Out

Final Report

- Positive and Negative Findings
- Methods and Results

Publications

- Social Marketing Quarterly
- Journal of Environmental Psychology
- Social Influence

Professional Conferences

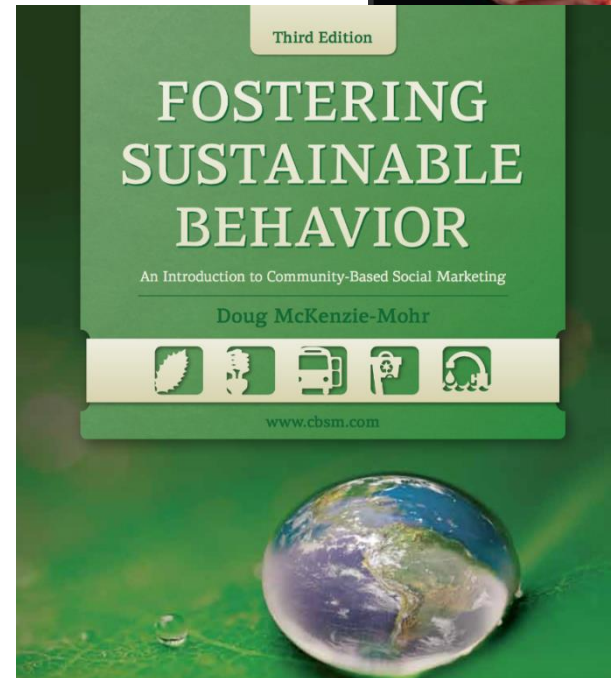
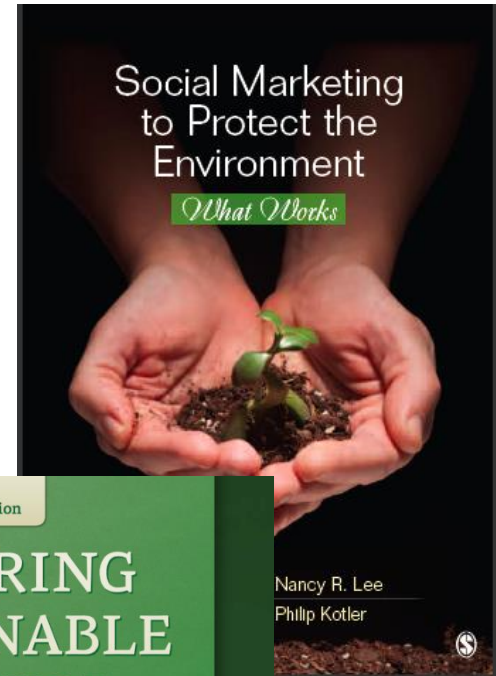
- Behavior Energy and Climate Change Conference
- World Social Marketing Conference
- Professional Organizations

Case Studies

- Tools of Change.org
- CBSM.com
- City website and other media outlets

CBSM Resources

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



Q & A

Implementation Plans
Challenges/Concerns

Post-Webinar Survey

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

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