Rapid Assessment for Outreach Programs Fostering Environmentally Responsible Behaviors

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Acknowledgements

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While all environmental organizations want to be able to demonstrate the effectiveness of their programs, assessing program design and implementation can be an overwhelming task. Where does one start? What measurements are most meaningful? How do I apply evaluation findings to improve my programs? This document is designed to assist organizations with assessing whether elements of their environmental behavior change programs are being used to their full potential. Program elements are summarized into one-page assessments, including questions about the use of a particular program element, based on what research shows is most effective. These questions serve to prompt the assessor in examining how a program is currently utilizing the element and ways use of the element could be improved.

First, the document includes assessment pages on two frameworks, participatory programming and social marketing, that can be used to help provide structure to your program. Second, a series of questions are asked about the use of two best practices that are crucial for effective outreach program design: targeting audiences and evaluation. Finally, questions are asked, in one-page assessments, of nine strategies that environmental outreach programs can utilize to foster environmentally responsible behaviors (ERB). These behavior change strategies can have the best impact when supported by a framework, such as the Participatory Approach or Social Marketing, in a well-designed behavior change program that also utilizes best practices.

While this document is not meant to give detailed explanations on how to employ frameworks, best practices, or strategies, the *Additional Resources* at the end of this document contains a reference list that will assist you in learning about and applying these methods to your outreach programs. The authors of this document also created a complementary guide explaining behavior change strategies and providing tips for effective use, *Strategies for Motivating Watershed Stewardship.* This guide is available online at the Chesapeake Bay Trust website.

FRAMEWORKS

Participatory Approach

Social Marketing

BEST PRACTICES

Targeting Audiences

Evaluation

STRATEGIES

Commitment	"How-To" Skills	Prompts
Extrinsic Rewards	Intrinsic Rewards	Social Norms
Feedback	Positive Emotional States	Stories

Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Is the program tailored to the audience?	X 1 2 3 4 5
Are the audience's specific benefits to doing the behavior well understood?	X 1 2 3 4 5
Are the audience's benefits to doing the behavior fully conveyed to the audience?	X 1 2 3 4 5
Are the audience's specific barriers to doing the behavior well understood?	X 1 2 3 4 5
Are the audience's specific barriers to doing the behavior addressed?	X 1 2 3 4 5
Was the program piloted prior to full-scale implementation?	X 1 2 3 4 5
Are the results of the pilot used to improve the program design?	X 1 2 3 4 5
Is evaluation conducted throughout the program to measure effectiveness and make suggestions for improvement?	X 1 2 3 4 5

Opportunities for Improvement

Framework: Participatory Approach

Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Are community members involved in the program design?	X 1 2 3 4 5
Are community members involved in the program implementation?	X 1 2 3 4 5
Is community members' knowledge asked for and utilized?	X 1 2 3 4 5
Are experts available to assist community members in making informed decisions?	X 1 2 3 4 5
Are leaders of the community involved in the program?	X 1 2 3 4 5
Do community members feel empowered to affect change?	X 1 2 3 4 5
Do community members trust your organization?	X 1 2 3 4 5
Are community members able to develop trust at its' own pace?	X 1 2 3 4 5
Does the program tap into existing community groups?	X 1 2 3 4 5
Are community members encouraged to plan a small, achievable goal early on?	X 1 2 3 4 5

Opportunities for Improvement

Question	Rating (X = No, 1 = A little, 5 = Very much so)
Is a specific audience targeted?	X 1 2 3 4 5

If targeting a specific audience:

Who is the audience?
_____
_____

How is information about the audience being used to shape program development?
_____
_____

What are the audience's barriers to the program goal(s)?
_____
_____

What are the audience's benefits to the program goal(s)?
_____
_____

How does the message of the program appeal to the audience?
_____
_____

How does the marketing of the program appeal to the audience?
_____
_____

Opportunities for Improvement

Best Practice: Evaluation
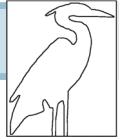
What questions does the evaluation seek to answer?
_____
_____

What measurable outcomes are needed to evaluate the project? Are any data or collection tools already available?
_____
_____

What types of formative (during-program) evaluation or assessment tools are employed?
_____
_____

What types of summative (post-program) evaluation or assessment tools are employed?
_____
_____

What resources are available for evaluation? What is still needed?
_____
_____

Is there participant follow-up?   Y / N

If yes, how long after the program? _____

How are evaluation results incorporated into program development or improvement?
_____
_____

Opportunities for Improvement

Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Is the commitment demanding or strongly worded?	X 1 2 3 4 5
Is the commitment specific and straightforward?	X 1 2 3 4 5

Is the commitment: *(Circle all that apply)*

Type of commitment

Verbal   Email   Written   Other: _____

Length of commitment

Short term (< 1 month)   Medium term (1 to 3 months)   Long term (+3 months)

Level of commitment

Individual   Group   Public   Semi-Public   Private

Why these choices?
_____
_____
_____

Opportunities for Improvement

Strategy: Extrinsic Rewards
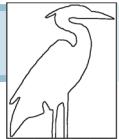
Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
How valuable is the reward to the participants?	X 1 2 3 4 5
Does the reward have value to the recipients?	X 1 2 3 4 5
Is the targeted behavior explicitly linked to the reward?	X 1 2 3 4 5
Does the amount or level of the reward inform participants of their level of success?	X 1 2 3 4 5

Is the reward given: *(Circle all that apply)*
Before the behavior   During the behavior   After the behavior

Is whether or not one is given the reward dependent on: *(Circle all that apply)*
Doing the behavior   Level of success with the behavior

How frequently is the reward given?
_____
_____

Does the reward assist the participants in being able to afford the desired behavior?   Y / N

Does the program incorporate other strategies (especially if long-term effects are desired)? Which ones? Why?
_____
_____
_____
_____

Opportunities for Improvement

Question	Rating (X=N/A or not used, 1 = A Little, 5 = Very much so)
How much do participants already engage in the behavior?	X 1 2 3 4 5
Is the feedback given close in time and space to target behavior?	X 1 2 3 4 5
How often is the feedback given? *Frequency:* _____	X 1 2 3 4 5
How private is the feedback?	X 1 2 3 4 5
Is the feedback explicit about the target behavior?	X 1 2 3 4 5
Does the feedback encourage long-term behavior change?	X 1 2 3 4 5

Question	Rating (X=N/A or not used, 1 = Very complicated, 5 = Very simple)	Question	Rating (X=N/A or not used, 1 = Very negative, 5 = Very positive)
How understandable is the message?	X 1 2 3 4 5	What is the tone employed in the feedback?	X 1 2 3 4 5

Does the feedback compare the participant to: *(Circle all that apply)*
Themselves   Others: _____   Neither

In which of the following ways is feedback given: *(Circle all that apply)*
Individual   Group   Public   Semi-Public   Private

Why and how?

_____
_____

Opportunities for Improvement

Strategy: "How-to" Skills

Target Behavior: _____	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Are participants told how to proceed with the behavior?	X 1 2 3 4 5
Are participants given ways to continue to improve their competence in the future?	X 1 2 3 4 5
Are participants given skills to overcome barriers to performing the behavior?	X 1 2 3 4 5
Are participants provided with information on how to acquire any necessary equipment or tools?	X 1 2 3 4 5
Are habits that might be barriers to the target behavior addressed?	X 1 2 3 4 5
Are participants already motivated to do the behavior?	X 1 2 3 4 5

Methods used to teach "How-To" Skills: *(Circle all that apply)*

Hands-on   Lecture   Handout   Other:_____

Opportunities for Improvement

Does your program…	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Highlight the value of using resources frugally?	X 1 2 3 4 5
Avoid making participants feel guilty?	X 1 2 3 4 5
Provide opportunities for direct participation?	X 1 2 3 4 5
Highlight opportunities for enjoyment or fun?	X 1 2 3 4 5
Allow participants to choose what behavior to adopt?	X 1 2 3 4 5
Highlight opportunities for competition?	X 1 2 3 4 5
Make the participants feel needed?	X 1 2 3 4 5
Highlight opportunities to challenge oneself?	X 1 2 3 4 5
Show that the behavior will not lead to a lower quality of life?	X 1 2 3 4 5
Highlight opportunities to learn new skills?	X 1 2 3 4 5

How will this program benefit target audiences? How does the program highlight these benefits?
_____
_____
_____
_____

Opportunities for Improvement

Strategy: Positive Emotional States
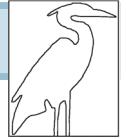
Does the program appeal to any of the following emotions?	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Hope	X 1 2 3 4 5
A sense of urgency	X 1 2 3 4 5
Fear	X 1 2 3 4 5
Pride/Accomplishment	X 1 2 3 4 5
Fun	X 1 2 3 4 5
Guilt	X 1 2 3 4 5
Feelings of nostalgia	X 1 2 3 4 5

Describe how your program appeals to the emotions above:

_____
_____
_____
_____

Opportunities for Improvement

Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Does the prompt engage participants?	X 1 2 3 4 5

	(X=NA not used, 1 = Rarely, 5 = Very often)
How frequently is the prompt given?	X 1 2 3 4 5

	(X=N/A No motive, 1 = Implicit, 5 = Explicit)
Is a reason for why one should do the behavior included in the prompt?	

	(X=N/A No motive, 1 = Far away, 5 = Very close)
How close is the prompt located to where the behavior takes place?	X 1 2 3 4 5

	(X=N/A or not used, 1 = Complicated, 5 = Simple)
How understandable is the prompts' intended message?	X 1 2 3 4 5

	(X=N/A or not used, 1 = Abstract, 5 = Concrete)
How specific is the prompt about the desired behavior?	X 1 2 3 4 5

	(X=N/A or not used, 1 = Negative, 5 = Positive)
What kind of tone is employed in the prompt?	X 1 2 3 4 5

How does the design of the prompt ensure that an individual will recall what behavior to perform?
_____
_____

Is the prompt tailored to the participants? Is yes, how so?
_____
_____

Opportunities for Improvement

Strategy: Social Norms

| Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Is the desired behavior framed as a social norm among community members, or as a behavior frequently performed by community leaders?	X 1 2 3 4 5
Is a positive relationship created between participants and program leaders?	X 1 2 3 4 5
Are the norms spread through change agents, such as community leaders?	X 1 2 3 4 5
Are program leaders seen as credible authority figures?	X 1 2 3 4 5
Is participation in the behavior voluntary?	X 1 2 3 4 5
Is there a strong group dynamic among participants?	X 1 2 3 4 5
Does the program appeal to the norm of reciprocation (wanting to help others who have helped you)?	X 1 2 3 4 5
Does the program appeal to the norm of liking?	X 1 2 3 4 5
Does the program appeal to the norm of consistency?	X 1 2 3 4 5
Does the program appeal to the norm of authority?	X 1 2 3 4 5
Does the program appeal to the norm of social acceptance ?	X 1 2 3 4 5
Does the program appeal to the norm of scarcity?	X 1 2 3 4 5

Opportunities for Improvement

Question	Rating (X=N/A or not used, 1 = Not much, 5 = Very much so)
Does the story appeal to inherently interesting elements, such as descriptions of nature?	X 1 2 3 4 5
Are the components of the story concrete, as opposed to abstract?	X 1 2 3 4 5
Do the participants easily understand the story?	X 1 2 3 4 5
Does the story use vivid imagery?	X 1 2 3 4 5
Does the story present a problem (which is then resolved)?	X 1 2 3 4 5
Does the story challenge the participants' previously held beliefs?	X 1 2 3 4 5
Does the story utilize elements of mystery that are revealed by the conclusion?	X 1 2 3 4 5
Does the story utilize the participants' previous knowledge, either in the form of previous experiences or learned facts?	X 1 2 3 4 5
Does the story create characters the participants can understand and identify with?	X 1 2 3 4 5
Is the subject matter of the story engaging to the participants?	X 1 2 3 4 5

Opportunities for Improvement
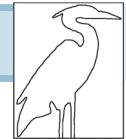
Evaluation Sourcebook: Measures of Progress for Eco-system- and Community-Based Projects. (Schueller et al., 2006)

This sourcebook, developed by the University of Michigan School of Natural Resource and Environment Ecosystem Management Initiative, provides sample evaluation questions, indicators and data sources to help projects track improvements in ecosystem health, economic vitality, quality of life, sustainability, or trust and collaboration. The Evaluation Sourcebook draws on the experience of many on-the-ground ecosystem and community-based projects, as well as the extensive liter-ature on ecological, social and organizational evalua-tion. It is designed to help you clarify and communicate what you are trying to achieve and to measure progress on multiple levels so that you can track improvements in ecosystem health, economic vitality, quality of life, sustainability or even trust and collaboration.

The sourcebook also includes instructions and worksheets to help you complete a logic model (i.e. situ-ation map) of your project and fill in four interrelated planning worksheets that contain your group's evalua-tion questions and indicators, logistics for collecting information, and plans to respond to evaluation find-ings. A tool to rank evaluation questions by importance is also used in conjunction with the *Measuring Pro-gress* text, which is available at the link. The sourcebook is available online at the Ecosystem Management Initia-tive website:
http://www.snre.umich.edu/ecomgt/evaluation/ sourcebook.htm

Fostering Sustainable Behavior: An Introduction to Com-munity Based Social Marketing (McKenzie-Mohr, 2009)

Community-Based Social Marketing (CBSM), developed by environmental psychologist Doug McKen-zie-Mohr, draws heavily on research in social psycholo-gy, which indicates that initiatives to promote behavior change are often most effective when they are carried out at the community level and involve direct contact with people. For more information see CBSM website: *http://www.cbsm.com/*

Getting In Step: A Guide for Conducting Watershed Out-reach Campaigns (EPA, 2010)

This guide is the EPA's "new and improved tips and tools for creating awareness, educating specific audiences, and motivating positive behavior change to improve water quality." Most information is a combina-tion of social marketing and the Nonpoint Source Out-reach Toolbox developed by the EPA. Part ! explains and gives examples of the six steps to developing a water-

shed outreach plan, including how to target audiences, create messages, and evaluate the outreach. Part II shows how to implement an outreach program. Finally, the Guide includes five additional resources for develop-ing and implementing a program, such as selecting be-haviors and choosing evaluation questions. The guide is available online at the EPA's website: *http:// www.epa.gov/owow/watershed/outreach/documents/ getnstep.pdf*

Heating Up Society to Take Environmental Action: A Guide to Effective Environmental Education and Com-munication (Academy for Educational Development, 2002)

The GreenCOM Project of the Academy for Edu-cational Development designed this guide to provide insight into what they have learned to be effective in motivating behavior. The guide is divided into five broad elements of effective programs: assessing your audi-ence, planning and developing strategies with communi-ties and removing barriers, pretesting and revising cam-paigns, implementing campaigns, and finally monitoring and evaluating campaigns. The guide is available online at the Center for Global Health Communication and Marketing website:
http://www.globalhealthcommunication.org/ tool_docs/51/heatingupsociety.pdf

Logic Model Development Guide (W.K. Kellogg Founda-tion, 2002)

The W.K. Kellogg Foundation developed this detailed overview of logic models. This guide describes what a logic model is and how it can be used to direct your evaluation efforts. Fictitious examples are used throughout to help readers understand the processes of both developing a logic model and using it to frame your evaluation questions. Helpful tips are also provided for establishing indicators to measure success. The appen-dix offers logic model templates as well as checklists of important things to consider when constructing each part of the model. The guide is available on the W.K. Kellogg Foundation website:
http://www.wkkf.org/knowledge-center/ resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspx

MEERA (My Environmental Education Evaluation Re-source Assistant) (Zint, 2010)

MEERA, developed by University of Michigan School of Natural Resource and Environment, EPA, and USFS, is an online guided, step-by-step process of pro-gram evaluation, including questions to ask before be-

ginning an evaluation, as well as a short overview of logic models: Questions addressed: What is a logic model? Why should I develop a logic model? How do I get started? While this is focused on EE, the advice is relevant for other types of programs. This resource also contains links to a multitude of helpful resources. Website: *http://meera.snre.umich.edu/plan-an-evaluation/ planning-and-implementing-an-ee-evaluation*

NOAA California B-WET Project Evaluation (Office of National Marine Sanctuaries, 2007)

This is an online guide designed for environmental education providers in California to evaluate their programs. The contents in the guide are relevant for outreach and engagement programs as well. Topics include basics on evaluation, as well as how to plan, design, implement, and report an evaluation.

Targeting Behavior: Working with People to Design Conservation Communications Strategies (Matarasso, 2009)

This Conservation International manual is designed to help conservation practitioners use Targeting Behavior to plan and carry out successful communication and education programs that lead to behavior change and conservation. The manual is divided into three sections. The first section is an overview of the Targeting Behavior methodology. The second section describes a case study of a marine program in Raja Ampat, Indonesia, where the methodology was used to develop an education and communication strategy. The third section of the manual walks you through the steps and tools you will use to identify (1) conservation problems and behaviors, (2) alternatives to those behaviors, (3) ways to overcome barriers, (4) target groups, (5) learning needs, and (6) program activities. The manual is available online at The State of the World's Sea Turtles website: *http://seaturtlestatus.org/sites/swot/files/CI-Targeting%20Behavior_low%20...pdf*

Tools of Engagement: A Toolkit for Engaging People in Conservation (Audubon, 2011)

The National Audubon Society developed this outreach program planning toolkit, which outlines 20 steps to successfully engage people in conservation. Steps detail such topics as identifying your goals, collaborating with the right partners, targeting audiences, evaluation, and selecting social strategies. Audubon also included concrete examples and additional planning tools to further assist conservation outreach organizations. The guide is available online at the Audubon website: *http://web4.audubon.org/educate/toolkit/toolkit.php*

Understanding and Influencing Behaviors: A Guide (Byers, 2000)

Bruce Byers and the Biodiversity Support Program developed this guide suggesting a simple process for collecting, understanding, and analyzing information about people's behavior in relation to the environment. Next, the guide detail nine "Stepping Stones", which are steps for motivating environmentally responsible behavior through outreach. These "Stones" explain how to target audience, choosing behaviors, evaluating, etc. The guide is available online at the World Wildlife Fund website: *http://www.worldwildlife.org/bsp/publications/bsp/ behaviors_eng/behaviorsguide_eng.pdf*

Additional Resources

Academy for Educational Development. (2002). Heating up society to take environmental action: A guide to effective environmental education and communication. GreenCom. http://www.globalhealthcommunication.org/tool_docs/51/heatingupsociety.pdf

Audubon. (2011). Tools of Engagement: a Toolkit for Engaging People in Conservation. http://web4.audubon.org/educate/toolkit/toolkit.php

Byers, B. (2000). *Understanding and influencing behaviors: A guide.* Biodiversity Support Program. Washington DC, USA.

EPA. (2010). Getting In Step: A Guide for Conducting Watershed Outreach Campaigns: http://www.epa.gov/owow/watershed/outreach/documents/getnstep.pdf

Matarasso, M. (2009). Targeting Behavior: Working with People to Design Conservation Communications Strategies: http://seaturtlestatus.org/sites/swot/files/CI-Targeting%20Behavior_low%20...pdf

McKenzie-Mohr, D. (2011) *Fostering Sustainable Behavior: An introduction to community based social marketing.* Gabriola Island, British Columbia: New Society Publishers.

Office of National Marine Sanctuaries. (2007). Education Project Evaluation. National Oceanic and Atmospheric Administration. http://sanctuaries.noaa.gov/education/evaluation/evaluation.html

Schueller, S.K., S.L. Yaffee, S. J. Higgs, K. Mogelgaard and E. A. DeMattia. (2006). *Evaluation Sourcebook: Measures of Progress for Ecosystem- and Community-Based Projects.* Ecosystem Management Initiative, University of Michigan, Ann Arbor, MI. http://snre.umich.edu/ecomgt/evaluation/sourcebook.htm

W.K. Kellogg Foundation. (2002). Logic Model Development Guide. http://www.wkkf.org/knowledge-center/resources/2006/02/WK-Kellogg-Foundation-Logic-Model-Development-Guide.aspx

Zint, M. (2010). MEERA's (My Environmental Education Evaluation Resource Assistant) guide to planning and implementing an EE evaluation: http://meera.snre.umich.edu/plan-an-evaluation/planning-and-implementing-an-ee-evaluation