



Community-Based Social Marketing for Tribal Environmental Professionals

This worksheet is intended to serve as a resource to help you brainstorm and plan a potential CBSM campaign for your Tribe. You can print this document and hand-write your answers, or type directly in each text box.

WORKSHEET EXERCISE, STEP 1: Select Behaviors to Promote or Change

Consider a problem you've been encountering related to sustainability or environment at your Tribe, that could be helped by human behavior. Remember, in this step, it is also critical to think about the audience – the folks that must change behaviors.

1. What is your general area of concern (e.g., increasing recycling rates)? What specific human behavior change(s) could most impact this area of concern (e.g., properly separating recyclables)?

2. Who is your general target audience (e.g., homeowners)? Will you have one very specific audience, or perhaps a few (e.g., homeowners and business owners)? Think about the location(s) of the behavior, in as specific a way as possible (e.g., homes, specifically those without commingled recycling services)?

3. Can you make the behavior even more precise (e.g., separating glass, plastics, and paper into their own bins)?

4. Combine all of these ideas into one to pick a behavior and an accompanying audience to continue to brainstorm about for the remainder of the workshops.

WORKSHEET EXERCISE, STEP 2: Identify Benefits of, and Barriers to, Behavior Change

Consider how you will identify the benefits of, and barriers to, behavior change. As you work, think about the behavior and audience you selected in Step 1. For this exercise, you can make some guesses and assumptions about benefits and barriers but remember: when you are preparing a CBSM Pilot, you **must** use research instead of just guesswork.

5. What do you think are some common **barriers** to this behavior at your Tribe? Specifically, with your target audience? List at least three barriers. Note if they are internal or external.

- 1.
- 2.
- 3.

6. Do you struggle with this behavior at all yourself? Do any of the barriers above apply to you or people you know? For this initial brainstorming exercise, these questions can help you begin to validate your initial concept.

7. What do you think are some **benefits** connected to this behavior at your Tribe? Are there any motivations that you think would provide enough benefit to drive change? Specifically, with your target audience? List at least three benefits.

- 1.
- 2.
- 3.

8. Can you think of a time you, or someone you know, changed or adopted a sustainable behavior due to its benefits?

9. What research methods do you think would work best for you to investigate barriers and benefits at your Tribe? Pick at least three that you think you have the resources to do, and briefly describe how you might conduct the research. Methods include questionnaires, literature reviews, communications audits, meetings, observations, data analytics, focus groups, and surveys.

- 1.
- 2.
- 3.

WORKSHEET EXERCISE, STEP 3, PART 1: Developing Messages in a CBSM Strategy

Use this page to brainstorm some messages that may help people overcome barriers or understand the benefits (Step 2) of your chosen behavior (Step 1). Remember: this is a brainstorming session. These kinds of messages should be tested using research before you can be comfortable with your message platform

10. Does your Tribe currently use any messages related to your chosen behavior (e.g., through existing outreach programs, on flyers, on the website)? If so, what themes or messages do you use or see?

11. Do you notice any of the messages trying to help people overcome barriers, or enhance the behavior’s benefits? If yes, list the related barriers and benefits below.

Barriers:

Benefits:

12. Thinking of the below potential messaging themes, which ones do you think would resonate best with the audience, and why? Write ‘Yes’ or ‘No’ for each one, and a quick reason.

Environment	
Money / Finances	
Responsibility to Community	
Do It for Family / Children	
Simplicity / ‘It’s Easy!’	

Quick Reference – Helpful Definitions

Step 2:

Barriers – Anything that currently prevents, or reduces the probability of, a person engaging in the desired behavior

Benefits – Anything that increases the probability of a person engaging in or changing the desired behavior; can be an existing internal motivation, or something new injected by the CBSM program

Internal – A barrier or benefit that stems from someone’s knowledge, perceptions, assumptions, or motivations

External – A barrier or benefit that is concrete (e.g., access, cost, ability)

Research:

Questionnaires – Documents to be sent to Subject Matter Experts to ask targeted questions

Literature Reviews – An assessment of articles, case studies, and best practices from similar efforts

Communications Audits – Reviewing existing Tribal communications related to the subject at hand

Meetings – Using regular calls to discuss and refine other research findings and generate understanding

Observations – Unobtrusively observing and noting how people currently engage in your targeted behavior

Data Analytics – Review existing data and metrics related to the subject at hand

Focus Groups – A moderated, structured conversation with ~6-8 members of community designed to elicit genuine feedback and insights from participants

Surveys – A method to get insights in a more anonymous, widespread manner using structured questions

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WORKING BREAK, STEP 3, PART 2: Choosing Tools for a CBSM Strategy

Consider some tools that may help people overcome barriers or understand / receive benefits (Step 2) of your chosen behavior (Step 1). These tools will likely include or reference the messages from the message platform you designed (Step 3, Part 1). Remember: this is a brainstorming session, but these kinds of tools should be tested using research, and you must have the resources (funding, staff) to create and use these tools.

1. Fill out the left column of the table below with the barriers and benefits that you identified in Step 2. Then in the right column, think of a tool you might use to help overcome each barrier or enhance each benefit.

Types of tools: convenience, communication, incentives, prompts, commitments, social norms.

BARRIER OR BENEFIT:	POTENTIAL TOOL:

2. Competition (or ‘gamification’) can be a nice Tool to plan a CBSM Pilot around. This can be a community game to reach a certain percentage or numeric goal, a friendly competition between offices or neighborhoods, a poster or flyer contest involving kids in schools... the sky is the limit! Jot one or two ideas below of how you might use gamification as a part of your CBSM Pilot.

WORKSHEET EXERCISE, STEP 4: Create a Plan and Pilot the Strategy

Consider the resources that you will need to plan and execute a CBSM Pilot. Think about the research that you will have to do, the planning, and the execution, and from there, consider your timeline. Use the tools that you identified in Step 3 as a starting point to think about what you will need.

Remember: when you do get to the actual planning of your CBSM Pilot, it will require you to set your baseline and write down your goals and objectives at this stage. You will first need to gather data and do research.

3. Consider the kind of research you wrote down in Step 2 (surveys, focus groups, interviews, etc.). What kind of resources do you need (staff, funding, space, survey tool, etc.)?

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4. Consider the tools that you thought of in Step 3. What kind of resources do you need to make these tools a reality (funding, graphic design, printing, procurement, etc.)? Can you think of sources for resources (e.g., grants, recycling \$)?

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5. Consider the length of the effort. How long do you want to run the pilot? Do you want to base it around any existing events (e.g., Earth Day)? How much time do you anticipate needing to plan and coordinate? For these sample milestones, jot down roughly when you think they should happen (week, month). Some of these steps will overlap, so they don't need to be perfectly sequential.

Identify Your CBSM Team	
Step 1: Select a Behavior	
Step 2: Conduct Research	
Step 2: Identify Barriers, Benefits	
Step 3: Develop Messages	
Step 3: Identify Tools	
Step 4: Identify Financial Resources	
Step 4: Assign Roles	
Step 4: Set Your Baseline	
Step 4: Begin the Pilot	
Step 4: End the Pilot	
Step 5: Evaluate Results	
Step 5: Determine Way Forward	
Ongoing Meetings and Check-Ins	

WORKSHEET EXERCISE, STEP 5: Evaluate the Pilot and Expand Implementation

Think about how you will conduct measurement and evaluation efforts, before, during, and after your CBSM pilot. Particularly consider how you will need to establish a baseline and set goals and objectives (Step 4), as measuring against these is crucial in your evaluation.

6. Think about the type of metrics that you would want to collect during your CBSM pilot, and the techniques that you will need to use to do that measurement. Write down three different metrics that relate to the behavior area you chose (Step 1). Pick at least one that is concrete (e.g., tonnage of recycling), and one that is knowledge-related (e.g., percent of Tribe that knows what NOT to put in the recycling bin). See Row 1 for an example.

Metric:	How to Measure:	When to Measure:
<i>% of Tribe that knows what NOT to put in the recycling bin</i>	<i>Intercept Interviews of a diverse range tribal members to ask questions</i>	<i>Before and after CBSM Pilot</i>

7. Consider the resources you need to secure an accurate baseline and measure progress with ongoing metrics. Who within or outside of your Tribe do you need to work with? What will you need them (or what will you) need to do?

8. What does success look like to you? What is your vision for CBSM at your Tribe? Think back to the area of concern that you identified in Step 1, and envision how a pilot might transform into broader change. This exercise may help you develop your goals and objectives when planning the CBSM pilot.

Quick Reference – Helpful Definitions

Tools:

Convenience – Adding new services or products allow/encourage behavior

Communication – Messages delivered via a variety of mediums (flyers, newsletters) to encourage behavior

Incentives – Creating a benefit to ensure benefits outweigh barriers

Prompts – Placing reminders for people to act

Commitments – Voluntarily signing a pledge or otherwise signaling commitment to change

Social Norms – Depicting a behavior as normal, commonplace

Steps 4 and 5:

Goal – the broader concept that the Tribe is trying to achieve

Objective – a measurable improvement that the Tribe is seeking, stated ahead of time

Baseline – a measurement or metric of the behavior prior to CBSM pilots or efforts