

## Session Three Summary:

Community-based Social Marketing: Selecting and Assessing Behavior Change Strategies | February 14, 2025

### Evaluation

#### What is evaluation and why to consider it early

Evaluation is the systematic process of assessing an intervention's effectiveness and outcomes. In the context of CBSM campaigns, evaluation can help determine what strategies are most feasible and relevant to implement while also helping to understand how and why behavior change strategies are working (or not).

#### Including evaluation early in the planning process allows you to

- Identify **measurable outcomes** you will target that align with your campaign goals. Clearly defined outcomes tie to metrics, which help determine if your CBSM campaign is achieving its goals.
- Design campaigns that can be **monitored and adjusted as needed**; allowing for continuous improvement through adaptive learning.
- Allocate resources by **knowing what to monitor and measure** to understand the broader effects.

### Inputs

It is essential to **align strategies, goals, and plans with capacity**. Knowing what you have (and don't have) helps set realistic expectations and leverage available resources effectively. Inputs can be tangible or intangible, and include (but are not limited to) the following:

- **People:** volunteers, staff, partners, community champions
- **Materials:** signage, brochures, social media platforms, trail cameras
- **Funding:** grants, donations, in-kind support
- **Community support:** existing stewardship or volunteer groups, friends groups
- **Relationships:** good standing with town officials
- **Skills:** graphic design, communication training

Each behavior change strategy **requires different resources**. To determine what you'll need, start by identifying the inputs needed for each strategy you are considering. This will help you allocate resources effectively and recognize any gaps. Begin by asking yourself the key questions below about implementation, then identify the necessary resources needed. Use the table below as an example, and be sure to distinguish between the resources you still **need** and the resources you already **have**.

CBSM Strategy	Questions to ask	Example inputs needed
<b>Prompts:</b> Reminding people to practice a behavior in the place where you want the behavior change to occur.	Am I ready to place prompt signs where and when the behavior occurs?	<ul style="list-style-type: none"> <li>• Knowledge of high-traffic areas</li> <li>• Tools for installation</li> <li>• <b>Permits for installation</b></li> </ul>
	Do I have resources for creating, printing, and maintaining prompts?	<ul style="list-style-type: none"> <li>• Graphic design resources</li> <li>• <b>Funding for printing</b></li> </ul>

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### Gaps in your inputs

Consider the following strategies to address any gaps and acquire the resources you may still need:

- Find partners to work with
  - Partner organizations with the same goal
  - Non-traditional partners (e.g., local stores or cafés, veterinarians, dog trainers)
- Scaling back your campaign to focus on 2-3 behavior change strategies
- Seek additional funds
  - Apply for a grant
  - Ask for a donor
  - Join collaborative projects

### Tracking and measuring outputs and outcomes

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Metrics are essential tools for connecting CBSM strategies to behavior change goals and evaluating the success of your campaigns. Defining what you will measure to determine if you are meeting your goals **in advance** of starting a campaign helps ensure metrics align with your goals and streamlines data collection, analysis, and reporting.

#### Guidance for identifying metrics:

- **Choose measurable indicators:** Indicators should directly measure what was accomplished or the success of a campaign. They can focus on **output** measures (the immediate results, like the number of products produced or events hosted) or **outcome** measures (what occurs as a result of outputs, like an improved skill or a change in behavior).
- **Connect behaviors to CBSM strategies to track outputs:** Assess how the CBSM strategies you've selected will promote the desired behavior. Define the specific actions you will take (outputs) and what your audience or shorebirds will gain or do as a result of those actions (outcomes). Each strategy should have measurable indicators to track progress and determine what has been accomplished. Additionally, identify how the target behavior aligns with your broader conservation goal and collect data relevant to that behavior.

The scenario below provides an example of output and outcome indicators that can be used to track behaviors and what has been accomplished.

**Campaign goal:** Improve shorebird ID skills and knowledge of what disturbance to shorebirds looks like. Several beachgoers do not know what shorebirds are or that there are endangered species on the beach.

**Strategy context:** To improve ID skills and increase awareness of what shorebirds are, I plan to host an environmental education event. In this event, I will start by delivering a lesson on shorebirds, disturbance, and identification tips to students. Then, students will be provided with ID cards and practice identifying shorebirds on the beach. The lesson will conclude with a sign making workshop, where students get to draw the birds they saw and craft a message on what actions people can do to protect shorebirds, based on the earlier lesson. Artwork will be displayed in the nature center, with a few turned into signs and placed at beach entry points.

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CBSM Strategy	Outputs to track	Outcomes to track
<b>Communication:</b> Environmental Education	<ul style="list-style-type: none"> <li>Number of visitors who attended the event</li> <li>Number of shorebird ID cards distributed</li> <li>Number of visitors who identified birds in the activity</li> <li>Number of student-drawn signs installed</li> </ul>	<ul style="list-style-type: none"> <li>Improved shorebird ID skills</li> <li>Increase in knowledge related to shorebirds and disturbance</li> </ul>

### Tools to measure and track metrics of outputs and outcomes

Some metrics will take longer to assess than others. **Assess your capacity**, funding, time, materials, and personnel for collecting data on your established metrics **and consider how often data can realistically be collected** and who will be responsible. Metrics may also require different forms of data collection, so be sure to identify if you need a pre/post treatment and how long it will take to expect a change (e.g., learning a skill versus a change in behavior). The tools outlined below can be used to track outputs and outcomes.

- **Static or Dynamic QR codes:** QR codes can be used to track engagement as an output.
  - **Static QR codes** are free, do not expire, but cannot track metrics on their own. To gather data, you will need to use external software like Google Analytics.
  - **Dynamic QR codes** can internally track engagement, but require a paid subscription. If the subscription ends, the codes expire.
- **Anecdotal observations:** Opportunistic and flexible, anecdotal observations capture real-time insights based on personal accounts. They are useful for those with limited time or who cannot directly interact with beachgoers. However, because they are subjective, they may be biased, so it's important to document both positive and negative encounters.
- **Formal observations:** Structured and systematic, formal observations reduce bias and provide reliable data for evaluation and reporting. Methods like trail cameras or independent observers can document observable, community-level behavior changes, which is an effective way to assess program impact beyond self-reported outcomes.
- **Surveys:** Surveys use structured questions to gather data on attitudes, behaviors, and characteristics from a representative sample of a population. They can range from simple post-event surveys to more formal studies that reach a large and diverse audience. To assess learning and behavior change, ask participants questions centered around their attitudes and how they plan to apply that knowledge. For example, questions about whether they think a certain disturbance behavior is good or bad, or whether they appreciate shorebirds or not.

### Systems for tracking

Refer to our usable and customizable [spreadsheet](#) for example data to collect for tracking engagement. Additionally, you can add tracking metrics to existing protocols to streamline data collection and accommodate capacity constraints.

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### Relevant resources

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Check out the [Shorebird Disturbance Reduction Toolkit](#) for more information on the collaborative human disturbance project and CBSM:

- The [Methods tab](#) gives a quick overview of each step of CBSM
- Under the [Data Collection tab](#) under resources, you can learn more about some of the methods above and view and download evaluation tools—like tracking spreadsheets and anecdotal observations templates.
- You can also view the [toolkit webinar](#) for more information on how to navigate the website

Additionally, view the [Guide to Applying Science and Management Insights and Human Behavior Change Strategies to Address Beach Walking and Dog Disturbance Along the Atlantic Flyway](#) for detailed information on how to apply CBSM to disturbance by beach walkers and dog walkers:

- Content on CBSM can be found on pages 8-25
- For more tips on implementing strategies, see page 56-57
- For more information about the resources needed for implementing strategies and available resources, see pages 58-68