Tools of Engagement

A Toolkit for Engaging People in Conservation

Audubon

EETAP

U.S. FISH & WILDLIFE SERVICE

Together Green
act today, shape tomorrow

Tools of Engagement: A Toolkit for Engaging People in Conservation
was developed by the National Audubon Society in partnership with
the U.S. Fish and Wildlife Service, the Environmental Education and
Training Partnership (EETAP), and TogetherGreen, a program of
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Design:
Weirdesign

Printed on FSC paper with environmentally friendly inks

Audubon

National Audubon Society
January 2011

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This is version 1.0 of a living document. Please send suggestions,
insights, and comments to: conservationtoolkit@audubon.org.

A big thanks to Gerry Ellis for the generous use of his amazing
photographs throughout this toolkit. To see more of his images,
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With the possible exception of the equator, everything begins somewhere.
—C.S. Lewis

Tools of Engagement

A Toolkit for Engaging People in Conservation

None of us is as smart as all of us.
–Ken Blanchard

Acknowledgments

Toucanet   Gerry Ellis

National Audubon Society

Audubon's mission is to conserve and restore
natural ecosystems, focusing on birds, other
wildlife, and their habitats for the benefit of
humanity and the earth's biological diversity.
Now in its second century, Audubon works
throughout the Hemisphere to connect people
with birds, nature, and the environment that
supports us all. Our national network of
community-based nature centers, chapters,
and scientific, education, and civic engagement
programs involve millions of people from
all walks of life in conservation action
to protect and restore the natural world.
Audubon believes in the power of education
and engagement to inspire people to learn,
care, and get involved. Through our work,
Audubon is empowering current and future
generations to create a healthier and more
just and sustainable world.

audubon.org

EETAP

The Environmental Education and Training
Partnership (EETAP) is a national leader in
delivering environmental education training for
education professionals. EETAP supports a wide
array of services and resources and is commit-
ted to ensuring that educators serving ethnically
diverse and low-income communities benefit
from and actively participate in education that
advances student learning and environmental
literacy. A consortium of nationally recognized
leaders in environmental education, education,
and professional development, EETAP conducts
strategically chosen activities in three broad areas:
Advancing Environmental Education; Professional
Development; and Reaching Diverse Audiences.
EETAP is funded by the U.S. Environmental
Protection Agency's Office of Environmental
Education through a cooperative agreement
with the University of Wisconsin–Stevens Point.

eetap.org

Red fox

U.S. Fish & Wildlife Service

The U.S. Fish and Wildlife Service is the premier government agency dedicated to the conservation, protection, and enhancement of fish, wildlife and plants, and their habitats. It is the only agency in the federal government whose primary responsibility is management of these important natural resources for the American public. The Service also helps ensure a healthy environment for people through its work benefiting wildlife, and by providing opportunities for Americans to enjoy the outdoors and our shared natural heritage. The Service is responsible for implementing and enforcing some of our Nation's most important environmental laws, such as the Endangered Species Act, the Migratory Bird Treaty Act, and the Marine Mammal Protection Act.

TogetherGreen

TogetherGreen is a conservation education program of Audubon in alliance with Toyota. Through national and local programming, TogetherGreen promotes innovation, leadership, and opportunities that inspire people everywhere to take action at home, in their communities, and beyond to improve the health of the planet. Millions of people have taken part in TogetherGreen activities, including more than 1,000 partner organizations across the country. The program funds and supports innovative conservation projects, leadership development, and volunteerism to engage people in habitat, water, and energy conservation, and works to engage people of all backgrounds and interests to achieve results and create a healthier and more just society.

fws.gov

togethergreen.org

If we want change, we must include everybody in the process.
—Ann Itto

# 20 Steps to Success

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One of the greatest challenges of conservation is preserving the incredible diversity of life while ensuring that people's needs are respected and protected.
—Henri Nsanjama

Planning with People in Mind

Plan for the future because that's where you are going to spend the rest of your life.
—Mark Twain

In 2009, a group of kids in downtown Columbus helped protect an important bird habitat that had suffered from years of neglect and overdevelopment. As they helped restore habitat, the young people learned about bird ecology, how to plan an action project, teamwork, and why habitat matters in an urban area that used to be a dump. This ongoing urban habitat restoration project is all about the community, city officials, non-profits, and businesses working together to conserve the Whittier Peninsula in Columbus, Ohio. It focuses on how education, in conjunction with sound science and civic engagement, can help restore and conserve an important wildlife habitat and engage a community—including young people, families, scientists, businesses, civic leaders—in local conservation issues, making their city a healthier and richer place to live.

A world away, in northwest Colombia, South America, a community is working together to help protect the cotton-top tamarin—a squirrel-sized monkey that is one of the most endangered primates in the world. Dr. Anne Savage, a conservation biologist from the United States, and experts in Santa Catalina, Colombia are collaborating with a number of community partners to develop a conservation project designed to protect the tamarins and their habitat. Their project focuses on educating the community, developing economic incentives, and getting kids and women involved in the protection of these pint-sized primates. (See The Case Study Collection for more about both projects at audubon.org/toolkit.)

Conservation can't happen without people.

In the face of environmental issues or challenges, a person or a group of people needs to do something new or different. in essence, to create change, we need to shake up the status quo. The challenge is nearly always the same: how do we, as conservation leaders, achieve the greatest impact with the most strategic use of resources? Answering this question involves finding the right balance of solutions, using science, policy, education, and communication. Some conservation leaders effectively engage people using education, social marketing, and other social strategies. Others choose not to use these tools—or at least, not in a deliberate or strategic process. To find out why, we conducted focus groups and surveys including more than 600 conservation professionals and interviews with 15 influential conservation leaders, as well as a literature review.

This toolkit is the result of that research. It is designed to help conservation professionals think through conservation planning with people in mind.

Content highlights include:

- **Step-by-step planning process,** including tip sheets to help guide how you engage people in your project

- **Case studies** that show how others have used education, social marketing, civic engagement, and communication to achieve lasting conservation goals

- **Research** about what moves people to take action, from the fields of environmental education, psychology, communication, and sociology, among others

- **Brief overview** of the Open Standards for the Practice of Conservation

- **Links to helpful resources** including the Smart Chart, Activation Point, Open Standards, evaluation templates, and other resources focused on the human dimensions of conservation and conservation planning

- **A focus on how to more effectively work** with diverse communities—and thinking about how to move outside your comfort zone

Note: Words in bold throughout the text are defined in the glossary.

This toolkit focuses on how to best engage people in your conservation work. To further enhance the effectiveness of your work, we recommend that you use this toolkit in conjunction with traditional conservation planning tools, such as the **Open Standards for the Practice of Conservation** (conservationmeasures.org/initiatives/standards-for-project-management) and the associated software tools, **Miradi** (miradi.org) and Conservation Action Planning (CAP) (conserveonline.org/workspaces/cbdgateway/cap/index_html), as well as others.

Finally, planning is not a linear process. The 20 steps outlined in this toolkit are designed to help you think through what you hope to accomplish and to create an ambitious, but realistic, plan. Most people reading this toolkit will not go in order from Step 1 to Step 20; even if you do, you would find that you'd need to revise as your thinking progresses. A key to any planning process is being flexible and adapting as you go.

Jumping spider   Gerry Ellis

Throughout this kit, we have linked to resources that will help you dig deeper into critical issues, such as evaluation, social marketing, community assessments, threat reduction, and other topics. What we hope is that these 20 steps will serve as a guide for your planning—and help you focus on how important it is to know your audience as you implement your plan of action. You might be trying to save birds, bees, and trees, but you can't do it without a thoughtful strategy to engage people.

Why Care About Conservation Planning?

When you mention planning to some people, their eyes glaze over. They'd rather *do* something than take the time to plan. But there are some major benefits to planning, whether you're just starting a conservation career or have been in the field for years. Thoughtful planning can help you clarify and articulate what you're trying to accomplish and help you explore options you might not have considered. Planning also has other critical benefits—it can help you set more realistic targets, understand the barriers to success, measure if you're accomplishing your goals, and shift gears if you get off track. Although too much planning can slow you down, the right amount can push you through an iterative and thoughtful process that improves your work and ultimately achieves better results.

Your First Big Decision

Before you get started, you need to think carefully about your endgame. Are you focusing on protecting specific conservation targets (species, habitats, landscapes, ecological processes) or are you working to help change overall societal values and build capacity for future environmental protection? Or are you trying to do both? In this toolkit, the first two chapters focus more on the former, but all the steps outlined focus on both and can apply to all conservation planning—including those projects that have a general goal of protecting the environment in the future.

If you work for a conservation organization or environmental agency, you probably will be focused more on achieving specific biodiversity goals. For example, if you work at the Chesapeake Bay Foundation, you are focused on protecting the Bay. If you work for the U.S. Forest Service, you will probably be looking at protecting forest resources, and at WWF, species and ecoregions around the world. However, the Center for Diversity and Environment is focused on diversifying the conservation movement, not a specific conservation target. And if you work at a nature preschool, you are investing in the future and hope that by engaging preschoolers, you can instill stewardship values at an early age and that eventually these young learners will become adults who care about the environment and work to protect it.

No matter what you hope to achieve, you need to outline clearly what you're trying to do and think deliberately about the steps to get you there. For example, with all project planning, you need to make decisions about your goals, who you need to engage, what you want people to know, care, and believe, what messages resonate with your audiences, and what steps will get you to your goals. You will also need to measure how you're doing—and find out if your assumptions are correct or whether you need to change your approach.

As you go through this planning process, use the steps that make sense for what you're trying to. And please use the resources—they will help you dig deeper into what you truly need to know to achieve success. Most conservation projects, whether you're trying to protect the Mississippi River or the golden monkey in China, will use a mix of strategies that focus on short- and long-term strategies so that you can achieve your goals and sustain them for the long term.

The 70-30 Rule

Most environmental groups and agencies work on projects that have both specific conservation targets and broader goals that are focused on changing societal values and investing in the future. Some organizations deal with dual but complementary goals by setting organizational guidelines. For example, your organization might decide to adopt the 70-30 rule, meaning that 70 percent of your engagement strategies will focus on specific and priority biodiversity targets, and 30 percent of your work will focus on changing societal values or working on long-term environmental change. These still might overlap—but it allows for creative thinking about how to create societal change. Both are critical, and there are many reasons why you'd want to focus on one or the other or both.

Engagement Strategies

priority conservation targets **70%** **30%** changing societal values
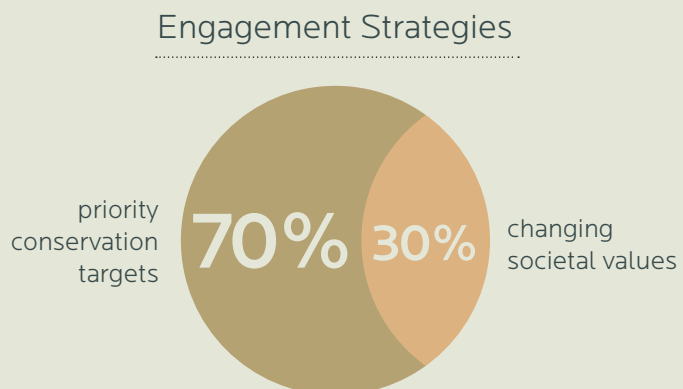
The bottom line is that conservation planning is messy and non-linear. You probably will be focused on both short- and long-term strategies simultaneously. Some of what you do will be focused on immediate change, while some of your work will be to change societal values and build a constituency that is skilled and committed to protecting the environment in the future.

What We Believe:

As you read through this toolkit, you'll see that we support certain key tenets about conservation planning, including:

• **Focus on integrated conservation for more effective and sustainable results over time.** (We define integrated conservation as science, policy, education, and communication all working together.) We believe that conservation results will be stronger and more sustainable if all disciplines are at the table from the start.

• **Target behavior change and involve people in the planning and the solutions.** Targeting behavior change can help create change and address environmental threats.

• **Know your audience.** One of the most important lessons from the research is that you need to know as much as you can about your audiences and stakeholders. It's easy to make assumptions about what people know and feel, and why they aren't engaged in environmentally friendly behavior—but assumptions aren't always correct. Learning and listening can help design better interventions.

• **Realize that experiential learning is a key to deeper engagement.** By integrating the experiential learning cycle into your programming, you can promote change. (See page 82 for more about experiential learning.)

• **Plan to persuade.** As Kristen Grimm says in "Discovering the Activation Point," persuasion is not a dirty word and it is critical to think about how we are going to persuade people to act if we want to accomplish social change. "Without action, there can be no change." (See Activation Point, spitfirestrategies.com)

• **Build in evaluation from the start.** If you don't envision what success will look like, it's impossible to measure your progress and know if you've succeeded. Articulating your theory of change outlines the path from your activities and strategies to achieving your goals. (See page 90 for more about evaluation and theory of change.)

• **Respect a diversity of perspectives and acknowledge that many people don't think in the same way you do.** It can be easy to assume that others share our thought process, reactions, and values—and will care about issues we do and in the same way we do. And when they don't, it's easy to lack respect for their position. Respecting the values of people in the planning process is critical for program success.

Tree frog

Your goals are the road maps that guide you and show you what is possible for your life.
—Les Brown

Section A. Know Where You're Going

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Step 8   Get Your Goals Right

Getting Started

Keep your eyes on the stars and your feet on the ground.
—Theodore Roosevelt

Achieving conservation results isn't easy. The problems have become increasingly complex and interrelated. It's impossible to address most conservation problems with one-discipline solutions or narrow thinking. We need active input and engagement from a diverse and informed constituency. We also know that environmental solutions need to integrate social equity and economic prosperity into the equation. Global warming, deforestation, water quality, air pollution, green consumer issues, and almost every other issue extend beyond borders and the solutions require integrated and sophisticated thinking.

Sequoia

These planning guidelines can help achieve more effective conservation results:

• Start with your vision for conservation success and go through a deliberate conservation planning process to ensure you've got the right **conservation targets**, and have identified the **threats** to the target, the **root causes** of the threats, and the human behaviors that are contributing to the problems

• Consider your **human welfare targets** in addition to your biodiversity targets (your targets will depend on your organization's priorities and the specific project intent)

• Make sure you involve the right people in the planning process so that you get input from an integrated mind set from the start; identify other **stakeholders** that need to be engaged throughout the process

• Develop your **theory of change**, articulating what you think you need to do to address the threats and root causes you've outlined and help meet your goals.

• Learn how to ground truth your assumptions about what your audience knows, cares about, and can do to help address the problems you are dealing with

• Thoughtfully identify the key audiences, tools, approaches, and strategies that will help you achieve your goals, building on the research about "what works"

The Planning Process

Before you start thinking about the people you want to engage and what you want them to do, you need to know what you're trying to accomplish. It's so easy to jump right into developing activities, without clearly articulating what you're trying to achieve, which helps drive what you need to do to be successful.

Although there are many planning processes, we recommend the **Open Standards for the Practice of Conservation** developed by the Conservation Measures Partnership (conservationmeasures.org/CMP/). This partnership is a collaborative group of conservation organizations that has been working since 2002 to "advance the practice of conservation by developing, testing, and promoting principles and tools to credibly assess and improve the effectiveness of conservation actions." In 2004 CMP developed the Open Standards, which define a common process and terminology for conservation planning. The Open Standards build on best practices from the field and are recognized by many as the current state of the art for conservation planning (conservationmeasures.org/CMP/Site_Docs/CMP_Open_Standards_Version_2.0.pdf).

The Conservation Measures Partnership also developed Miradi, a software tool that links to the Open Standards and helps you visualize the steps. Miradi can guide you through conceptualizing your project and the steps needed to achieve your conservation goals. It includes definitions, models of practice, suggestions for how to think through your project design, and how to develop a results chain that outlines your theory of change. Although working through the process in Miradi takes time, it is an excellent tool to clarify your thinking and help design a path for achieving conservation results (miradi.org). But it's also important to know that you don't need to use a software program to think through what you want to do and how you'll get there. The activities in this toolkit are designed to help do that using flip chart paper, sticky notes, and other resources that don't require a computer.

If you are reading this and are currently working on a project, then you have probably gone through some sort of planning process. However, if you're not familiar with conservation planning, you might want to see how your project planning compares to the ideas outlined here. The first two chapters of this toolkit are based on the Open Standards to help you think through what you're trying to do, what information you need to have, and who should be at the table. If you are currently in the middle of planning a project and have already identified your vision, team, and targets, skip to Chapter 3. From that chapter forward, the toolkit discusses how to explore root causes of problems, identify target audiences, understand more about your audiences, and design effective strategies for reaching them.

More About the Open Standards

The Open Standards for the Practice of Conservation are a set of adaptive management guidelines that reflect the best practices of a number of conservation organizations. Developed by members of the Conservation Measures Partnership (CMP) (conservationmeasures.org/), the Open Standards bring together common concepts, approaches, and terminology in conservation project design, management, and monitoring to improve the practice of conservation. According to the founders, the Open Standards are less a recipe that must be followed exactly than a framework and guidance for conservation action.

The standards are organized into an adaptive management cycle, including conceptualization, planning, implementation, analysis, adaptation, communication, and iteration.

1. Conceptualize
• Define initial team
• Define scope, vision, targets
• Identify critical threats
• Complete situation analysis

2. Plan Actions and Monitoring
• Develop goals, strategies, assumptions, and objectives
• Develop monitoring plan
• Develop operational plan

3. Implement Actions and Monitoring
• Develop work plan and timeline
• Develop and refine budget
• Implement plans

4. Analyze, Use, Adapt
• Prepare data for analysis
• Analyze results
• Adapt strategic plan

5. Capture and Share Learning
• Document learning
• Share learning
• Create learning environment

To find out more, go to conservationmeasures.org

Adaptive management—An approach to conservation planning in which testing and monitoring are integrated into a project's design and management. This approach provides feedback that is designed to improve project planning and implementation and lead to better decisions as the project progresses.

Team Up for Success

We expected that good-to-great leaders would begin by setting a new vision and strategy. We found instead that they first got the right people on the bus, the wrong people off the bus, and the right people in the right seats—and then they figured out where to drive it.
—Jim Collins

Who needs to be on your project team? According to many management experts, the most important decision you will make as a project leader is assembling the right team. This includes your core team who will be working directly with you on the planning process and helping think through what you hope to accomplish. And it will include broader stakeholder groups (in most cases) who need to be part of the discussions to get their feedback, ideas, solutions, and buy-in.

Forming a Core Team

In the case of conservation planning, the best thinking is to assemble the most insightful, diverse, and knowledgeable interdisciplinary team you can find. You might not think you need a mix of disciplines—especially when you're initially focused on the science side of biodiversity to identify your targets and threats—but you will be surprised at what a diverse group brings to the table in terms of knowledge, skills, ideas, and approaches. Don't make the mistake of developing the plan on your own and then expecting the community and key stakeholders to simply embrace it when you unveil it. The process should be inclusive from the beginning so that you have best thinking and buy-in from day one.

You also might decide to form an initial core team, but later create sub-teams that can focus on specific aspects of the plan. For example, as you dig into your project, you may want to have the disciplinary breadth to be able to understand the conservation issues, the science behind the issues, and the social and political dimensions of potential courses of action.

When you have the right team, you can work together to collectively define the scope and vision for your program or organization. You will be able to identify and understand the conservation issues, the underlying causes, the people who need to be a part of the solution, and how to effectively engage those people to achieve conservation success.

Gerry Ellis

See **Tool #1** on page 114 in **Section E** to help you work through the process of identifying the members of your team.

Step 2

Consider Key Stakeholders

Luck doesn't win conservation battles. Strong partnerships and committed people with vision and compassion win the day.
—Robin Grove

After you've assembled your core team, consider key stakeholder groups that should have input into your vision and plan. Again, you should think about engaging stakeholders throughout your planning and as you implement your project.

Keep in mind that:

- It takes time to engage stakeholders, but can also help you win support, get better thinking, and have buy-in when you need it.

- You might not know who the stakeholder groups are until you dig more deeply into the steps of this planning process.

- You won't be able to involve everyone—but there are a number of ways to prioritize your audiences.

- Keep stakeholders in mind throughout the planning and project implementation process.

Stakeholders, by definition, are individuals or groups of individuals who have an interest, or "stake," in the outcome of your conservation effort. Their interest may be positively or negatively impacted by the project. Some may serve on your core team, some may be advisors to your effort, some may lend support along the way, and some may prove to be target audiences.

At the onset it's important to think about the differences between core team members and stakeholders. Your core team members are those who will be undertaking the project—planning, implementing, evaluating, and revising the steps along the way. Your team may, in fact, include many representatives of stakeholder groups. However, stakeholders are likely to be a much larger group of people whose interests may be affected by the project—those who are likely to have an interest in the undertaking.

Community-based approaches to biodiversity and social issues often address conservation and development simultaneously with the intention of building long-term and inclusive conservation strategies. The core team will need to decide how much stakeholder participation is desirable and how to manage that participation. For example, if the team decides to bring together local stakeholders who have differing social and biodiversity objectives, the team will need to have a plan for how to facilitate discussions and negotiate points of disagreement.

> See **Tools #2** and **#3** on pages 116 and 118 in **Section E** for help with the process of identifying and analyzing your stakeholders.

Here are some stakeholder tips to keep in mind:

- Think about who needs to be engaged: Work with your core team to think about all the groups that should have a voice in the planning process. Consider who would have an interest in the issue and outcome and who might have ideas that will help you reach your goals. Even if you have a dynamic and interdisciplinary core team, additional stakeholders may bring valuable knowledge and experience to the planning process.

- Begin the conversation: Initiating dialogue with community members provides a sense of the individuals or groups currently working in the area. Open conversations also help to identify the interests and concerns of stakeholders.

- Map interests and communities: As part of your project planning, it's important to develop an understanding of potential areas of conflict, synergies, and ways to reconcile short- and long-term goals.

- Encourage discussion: Organize meetings and roundtable discussions with individual user groups to build consensus around common interests.

- Establish ground rules: Create a set of guidelines for collaborating with stakeholder groups to help guide future decision-making.

Why engage stakeholders?

Although there is no universally effective way to incorporate stakeholders, researchers and practitioners generally agree that stakeholder participation is a critical part of the planning process. Specifically, involving stakeholders in conservation decisions can accomplish the following:

- Produce better outcomes or decisions
- Develop public support for organizations and agencies, as well as their decisions and programs
- Uncover important local knowledge about natural resources and biodiversity threats
- Highlight social and cultural issues and context that will influence the success of your project
- Increase public understanding of conservation issues or management decisions
- Reduce or resolve conflicts between stakeholders
- Help successfully implement new programs or policies
- Improve buy-in for enforcing and upholding compliance standards
- Help organizations and agencies identify problems with existing strategies and how to resolve
- Create new relationships among stakeholders

See Sources in Public Participation from the National Park Service for more information on stakeholder engagement (nps.gov/hps/pad/plancompan/PublicPartic/ParticSources.html).

Also see Common Stakeholder Participation Techniques from NOAA (csc.noaa.gov/publications/stakeholder_participation.pdf).

Wildebeest migration

Identify Partners and Advisors

People say New Yorkers can't get along. Not true. I saw two New Yorkers, complete strangers, sharing a cab. One guy took the tires and the radio; the other guy took the engine.
—David Letterman

When spider webs unite, they can tie up a lion.
—Ethiopian proverb

Some of your stakeholders might become important project partners. It's important to cultivate partnerships and figure out what your organization can do, what another group might be able to take on, and what you can do better together. Multiple partnerships are the norm—and the better you can work with others, the more effective your organization will be, from getting more funding to being able to deliver results on the ground. And by sharing costs, expertise, and approaches, the projects themselves will be stronger. Partnerships also help ensure that conservation work will be sustainable—especially by getting support from multiple groups with overlapping goals and different levels of support related to the place or issue on which you're working.

How you work with others is critical. Partnerships aren't always easy, but they can mean the difference between success and failure. For tips on developing effective partnerships, see the box below.

A Partnership Tip Sheet from a Successful Partnership: Audubon and Disney

• Be strategic about who you choose as partners

• Think Diversity: Who has what you don't have? Who can add new perspectives, insights, and ideas?

• Remember that mutual respect and trust matter

• Identify roles and responsibilities before you begin the work

• At the start, define what each partner can bring to the relationship and what each partner needs.

• Develop a process for making decisions; decide who has final say on what

• Get important agreements in writing, including how you will share information

• Show courage: address conflict directly. Don't let problems fester.

• Play to each other's strengths

• Look for shared purpose, passion, and vision—or enough to make it work

• Give credit

• Pay attention to power, equity, and words; if you're the larger partner, remember to do what you can to equalize the partnership and always be respectful in what you say and how you act

Northern gannets

• Have an exit strategy: Is this partnership forever?

• When you get stuck, hire someone smarter than you to help un-stick you! That can mean hiring a facilitator, mediator, or trusted colleague.

• Have patience. Working with partners can take time; it might be easier to go it alone, but it's usually not better

• Celebrate success! Don't wait until the end of the project—look for opportunities to celebrate small wins along the way, as well as the ultimate success at the end.

Do you need advisors?

For some projects, you might want to set up an advisory board. Advisors would be experts to call on for outside advice. An advisory board can add credibility to your project and get buy-in from experts from other organizations who will be ambassadors for your project and help with specific aspects of the project strategies.

You can use an advisory board in a number of ways:

- one time advice as you create your project plan (to make sure you've thought through all the pieces)
- on-going advice (periodic meetings and phone calls, as needed during specific stages of your project; for example, their willingness to help when you get stuck)
- assistance with fundraising and other specific support

See **Tool #4** on page 120 in **Section E** for more information on identifying and building successful alliances and partnerships.

Lion and cub   Gerry Ellis

The fundamental glue that holds any relationship together is trust.
—Brian Tracy

Common Stakeholder Participation Techniques

METHOD	DESCRIPTION
Advisory group/task force	Small group of people representing various interests that is set up to advise an agency on programs or actions. Advisory groups can be multi-year or indefinite arrangements, while task forces usually complete a single task and then disband.
Charrette	Intense, multi-day effort to design something or solve a problem. There are multiple versions of the charrette, most of which include a design team that attempts to translate public input into a form that could be implemented, for example, a new policy, zoning regulations, or building design.
Field trip	Trip to specific location organized so that participants can match their mental images to real, on-the-ground conditions. Participants may be asked to express their reactions verbally or in writing.
Focus group	Small discussion group led by a facilitator who draws out in-depth stakeholder input on specific questions. Normally, several focus groups are held, and participants can be chosen randomly or to approximate a subset of the community.
Hotline	Widely advertised telephone number that directs callers to someone in an agency who can answer caller questions and collect input.
Internet	Dialogue between agencies and stakeholders using Internet technology such as chatrooms, on-line bulletin boards, e-mail, and Web conferencing.
Interview	Face-to-face or telephone interaction with stakeholders conducted by the agency or by a third-party representative.
Large group/ small group meeting	After an opening presentation, the group is broken into smaller groups to discuss an issue or complete a specific task. Summaries of small group discussions and an open comment period may follow.
Open house	Event in which the public is invited to drop in at any time during an announced period. Event often includes staffed booths or stations on specific topics and may precede a public meeting.
Poll or survey	Written or oral lists of questions to solicit community impressions about issues at a specific moment in time. Polls and surveys can be administered in person, or via the telephone or Internet.
Public hearing	Formal, single meeting where stakeholders present official statements and positions, and those ideas are recorded into a formal record for delivery to the agency.
Public meeting	A large public comment meeting where the participants stay together throughout the meeting and make comments to the entire audience. Public meetings are less formal than a public hearing. Public meeting may also be used as a blanket term to describe many of the meetings described in this table.
Referendum	A direct vote by the whole electorate on its support of specific proposals or courses of action. Referendums should be preceded by public participation so that the options before voters are credible.
Retreat	A concentrated yet informal meeting away from the typical work setting that emphasizes social interaction as well as discussion of issues.
Town meeting	A less formal public hearing where all stakeholders have the opportunity to speak and may vote on an issue.
Workshop	Small stakeholder gathering, typically fewer than 25 people, designed to complete a specific assignment in a short time period.

Gather Your Facts and Figures

Where is the life we have lost in living? Where is the wisdom we have lost in knowledge? Where is the knowledge we have lost in information?
—T.S. Eliot

We are drowning in information, while starving for wisdom. The world henceforth will be run by synthesizers, people able to put together the right information at the right time, think critically about it, and make important choices wisely.
—E.O. Wilson

Before you bring your team together to begin the planning process, it's important to have as much information as you can about your intended project. Without doing at least some preliminary work, your meeting won't be as productive as it could be. Here's a checklist of some of the info you should pull together. (But be careful about circulating too much information in advance of a first core team meeting so that you don't overwhelm your colleagues or look like you've made decisions in advance.) Many of your core team members may have expertise in the following areas and can bring the information that they feel will be most helpful.

Checklist:

✓ **Science**—find out critical information you need about the biodiversity (habitats, species, assemblages, and other aspects of the biodiversity) that are relevant to your project. It's important to make sure the team has the big picture about the regional context—including landscape and biome issues, watershed issues, geology, and so on.

✓ **Demographics**—gather as much information as you can about the people and communities of the area, such as population data from the census, economic base, ethnic background, politics, locations of cities and towns, schools, and community centers.

✓ **Conservation history and current status**—it helps to understand the history of environmental issues in the region and the history of the problems.

✓ **Existing work and partners**—in most places, your group won't be the only one working on an issue. If you can bring a summary of current conservation work being done in the region and potential partners, it can help eliminate duplication and promote collaboration.

✓ **Maps**—bringing maps of the area you will be working in (GIS data showing species distribution, population, watersheds, and so on) can help set the stage. Even if your organization doesn't have GIS capability, check with your partners—universities, NGOs, government agencies, and businesses. You can also use Google Maps to develop a good outline of your project area. (See maps.google.com and select My Maps, and then Create New Map.)

✓ **Social Mapping**—a map of the community neighborhoods and assets could be very helpful in your planning. If your project is in an urban area, green maps can be helpful, as well as other mapping projects by human welfare and other groups.

> For more information and a worksheet about conducting a community assessment, see **Tools #5** and **#6** on pages 122 and 126 in **Section E.**

The Bottom Line

To create a strong plan, you need to think through your team, partners, and stakeholders and what information you need to guide your efforts.

Ask yourself the following questions:

• Have you assembled the right core team?

• Have you mapped out the key individuals and groups who care about your project, can help, or can hurt your efforts?

• Do you know who is already working on the issues, and could be a great partner?

• Do you have all the information you need to make decisions about your work? If not, how will you gather it?

• Do you know the community well enough to move forward? Would spending more time on a community assessment be helpful at this stage in your planning?

2

What Are You Trying to Do?

Vision is the art of seeing things invisible.
—Jonathan Swift

The first step in any planning process is to think about the end: What are you hoping the world will look like if you are successful? How big a chunk of the problem(s) are you going to take on? What are the geographical boundaries of your project? How can you best articulate your vision?

Are you going to try to protect an entire watershed or a part of the watershed? Are you hoping to protect water quality for the nearby towns that rely on the water or for an entire region? Are you going to bring back one population of endangered frogs or multiple populations? Are you looking at protecting the MesoAmerican reef or multiple reef systems in different parts of the world?

As you think through planning steps, there's always a push and pull between being creatively ambitious, yet realistic. Although there aren't right or wrong answers, the decisions you make during these initial steps will help frame your project.

We learn from our gardens to deal with the most urgent question of the time: How much is enough?
—Wendell Berry

Step 5 | Define Your Scope

There's nothing like biting off more than you can chew, and then chewing anyway.
—Mark Burnett

Determining the scope of the project sets the stage for all the other thinking related to your project. In this step, it's important to think carefully about the geographic scope, as well as the biodiversity and social scope. Defining your geographic scope involves two steps: 1) delineating a clear, physical boundary on a map, and 2) describing what that scope is.

The **geographic scope** focuses on where your project will take place and what the boundaries of the project will look like. The boundaries you set will depend on a number of things, including the biological needs of what you are trying to do and the capacity you have to do it. For example, if you are working to maintain and increase healthy populations of wood thrushes, then you need to focus on creating or restoring a tract of contiguous deciduous forest large enough to support a breeding population of that species. Or if you are trying to protect water quality in a particular river, you need to set boundaries that will help address the root cause of the issue. Successfully defining the geographic scope means actually drawing a physical line on a map delineating the perimeter of your work area.

As you go through a planning process, your original ideas about scope might change. And as you apply a capacity filter to the scope, you'll have to figure out the balance between being ambitious and realistic. (For example, you might want to tackle a huge geographic area, but don't have the staff, resources, or expertise.) You also need to think about how you will determine what you and your team do and what other partners might do. For example, you might focus on biodiversity targets, but team up with another organization that is focused on specific human welfare targets.

Setting Boundaries and GIS

The geographic limits of your project will have a significant influence on the nature of your activities and the capacity of your team to succeed. At the start of your project, you need to delineate the physical boundaries of your project area. This is where it really helps to have mapping expertise on your team, including GIS capacity, so that you can discuss and agree on the geographic scope of your effort. Many variables will affect this decision—ecological viability, political reality, and organizational capacity. The scale of the project is one of the most important decisions you will make—you need to decide if you're working at a local, landscape, ecoregion, national, or global level.

In the end you should be able to draw an actual physical line on your map encompassing the project's range. In addition to the project map, you will need to articulate in writing the physical scope and nature of your project.

If your team lacks GIS expertise, consider asking another conservation organization or a local university for assistance. You might also consider adding someone to the team who can provide that skill set.

See **Tool #7** on page 128 in **Section E** to help you work through the process of identifying your project's scope.

Step 6

Craft Your Vision

Vision without action is a daydream. Action without vision is a nightmare.
—Japanese proverb

The soul never thinks without a mental picture.
—Aristotle

A vision can inspire and help articulate what will change as a result of your work. Crafting the vision is critical because it helps you envision what success looks like, what you're trying to protect, and why people should care. The vision is a mix of what you hope to achieve and the inspiration that will help others want to be a part of it.

Criteria for a Good Vision Statement

A good vision statement should meet the following criteria:

- **Relatively General**—Broadly defined to encompass a broad range of potential project activities
- **Visionary**—Inspirational in outlining the desired change in the state of the targets toward which the project is working
- **Brief**—Simple and succinct so that all project participants can remember it

The following examples articulate the vision statements and geographic scope for two projects that are quite different from each other:

Atchafalya Watershed Conservation Project

Vision Statement:
Atchafalaya Watershed is reconnected to the Mississippi River deltaic system and ecological processes are restored for the people and biodiversity of the region. The Atchafalaya Watershed is managed to protect the ecological integrity of the ecosystem.

Geographic Scope:
Atchafalaya Watershed, between Bayou LaFourche and Bayou Teche in Louisiana, including the area of deltaic influence and associated coastal wetlands.

Galapagos Island Conservation Project

Vision Statement:
Protect and sustainably manage the marine resources of the Galapagos Islands for the benefit of our grandchildren's grandchildren.

Geographic Scope:
The marine resources of the Galapagos Islands' traditional fishing grounds.

Vision: A vision statement is a description of the desired state or ultimate condition that a project is working to achieve. A complete vision can include a description of the biodiversity of the site and/or a map of the project area as well as a summary vision statement.

For more on how to create a vision, see **Tool #8** in **Section E** on page 130.

Choose Your Conservation Targets

Aiming for the moon and missing it is better than aiming for the ditch and hitting it.
—Anonymous

After you've got your team in place, and you've defined the scope and crafted the vision statement, the next step is defining the specific conservation targets. Targets are the "things" you are hoping to protect or conserve. These can either be biodiversity targets or human welfare targets.

Biodiversity targets are the biological or ecological elements that you intend to protect or restore. They may be individual species or suites of species such as red-eyed vireos or riparian forest songbirds. Targets can also be a particular habitat type such as tall-grass prairie, a coastal wetland, or a specific tundra ecoregion. They can also be ecological phenomena (migration of monarchs or wildebeests) or assemblages of species. Ideally, your chosen target(s) will represent a proxy for the full spectrum of biological diversity in your project area so that protecting your target will also protect the ecosystem as a whole.

Conservation targets can also be human welfare targets, meaning simply that the concern for the specific issue is primarily for the benefit of humans. For example a project can focus on the improvement of water quality within a watershed because the human population depends on having a clean, healthy supply of drinking water. Or you may be focused on the sustainability of particular fish species because the local fishing communities are dependent upon viable, sustainable game fish. Or you may be concerned about the air pollutants emitted by local industry because of the rising rate of childhood asthma. All of these projects will have very specific, measurable targets, but instead of protecting a specific species or habitat, the concern is human welfare and the negative impacts environmental degradation has on the health or vitality of people and their future.

Many conservation projects will have both biodiversity targets as well as human welfare targets. It's important to define these targets clearly because they are the basis for setting your goals and measuring your success.

Once you have identified your targets, you need to determine their status—in other words, what is the current condition of the targets? If your target is a species, you will need a baseline assessment of the population. If your focus is a habitat, you will need to quantify the number of acres and current condition of that habitat existing in your project area. And if your target is an ecological process, it will be important to know the natural periodicity of that process as well as the current frequency. These data will form a baseline measure that you can use to measure your project's success.

Examples of Conservation Targets

Biodiversity Targets

Species	Red-eyed vireos, green sea turtles
Suites of species	Riparian songbirds
Habitat	Cottonwood gallery forest
Ecological process	Seasonal flooding that supports migration
Ecological phenomenon	Migration of large mammals in the Okavango Delta

Human Welfare Targets

Water quality	Eliminate *E. coli* from groundwater aquifer
Sustainable fishery	Restore and sustain adequate populations of Atlantic cod
Air quality	Reduce winter particulate emissions so as to reduce asthma in local community

Targets: What are the specific conservation targets for your work? Are you trying to protect an endangered species? A threatened landscape? A polluted body of water? An entire ecoregion? Jobs? Ecosystem services? Are you trying to restore a habitat? Is there a species or population that will benefit from the restoration?

Get Your Goals Right

There are always flowers for those who want to see them.
—Henri Matisse

For each target, you will need to develop one or more goals that will help you and your team know exactly what you're shooting for. These high-level goals should outline what success looks like for your target.

Here are several examples of goals:

- By 2020, at least 80% of the Marine Reserve's intertidal zone supports healthy populations of cormorants, marine iguanas, chitons, and bivalves.

- By 2020, at least 100 pairs of nesting penguins are successfully reproducing at the Marine Reserve, leaving two eggs per clutch every year.

- By 2015, reduce the annual number of Stage 1 Air Quality Alerts in the Missoula air stagnation zone to less than five.

- By 2015, the number of cases of asthma in DC's 4th ward has been reduced by 15% for young people aged 4-15.

Whenever you're working on a goal, your project team should ask itself:

✓ Is it linked to a target?
✓ Is it impact oriented?
✓ Is it measurable?
✓ Is it time limited?
✓ Is it specific?

For more about how to develop goals for your projects, linked to your targets, see the Open Standards.

The Bottom Line

To achieve your conservation goals and improve the status of your biodiversity and human welfare targets, it's important to know what you're aiming for.

Ask yourself the following questions:

• What is the geographic scope of your project?

• What is your overall vision for your project? If you are successful, what will your project area look like when you are done?

• What are your biodiversity targets?

• What are your human welfare targets?

• What are your measurable goals for each target?

Can a Conservation Project Have Broad Environmental Improvement Goals Instead of Specific Targets?

Yes, some of your projects might not have specific biodiversity targets. But you still need to think through what you're trying to do. For example, you might be working to strengthen a local conservation constituency that will help protect a broad spectrum of biodiversity, or designing a program that provides people with the skills to get involved in the political process—an approach that would benefit a number of environmental issues, not just one biodiversity target. Or you might be focused on creating broad societal change (diversifying the conservation movement, integrating environmental education into formal school programming) to help protect the environment in the future and deal with problems that we don't even know about now.

The difference between these projects and those that are aimed at a specific biodiversity or human welfare target is how you will measure success. Many will focus on people measures. (Did the conservation field become more diverse? Do more people in a community consider themselves part of the environmental movement? Did more people vote for green-leaning candidates? Do more young people understand how to get involved in civic issues when they graduate from high school?)

There are no clear-cut boundaries, though. Many projects with conservation targets include strategies that build capacity, educate, engage, and change societal values.

The important thing is to know what your ultimate target is—because that will guide the rest of your planning.

Birch forest

Brown pelicans
Gerry Ellis

Section B. Understand the Problems and Context

Step 9   Identify Threats to Your Targets

....

Step 10   Dig into the Root Causes

History shows us that the people who end up changing the world—the great political, social, scientific, technological, artistic, even sports revolutionaries—are always nuts, until they are right, and then they are geniuses.
—John Eliot

There is one thing stronger than all the armies in the world, and that is an idea whose time has come.
—Victor Hugo

What's Causing the Problems?

If you can find a path with no obstacles, it probably doesn't lead anywhere.
—Frank A. Clark

Once you've clearly defined your project scope, your team, and the specific conservation targets for your work, the next step is to explore the threats to those targets and to understand the underlying causes of the threats. This is the time to not only outline the key threats, but to also dig a little deeper to truly understand the human behaviors that are contributing to the problems. You can't put an effective strategy in place until you know what the root causes of the problems are, why people are doing what they're doing, and where you might be able to best intervene.

For example, if your target is protecting an endangered population of frogs, what are the direct threats to the frogs and what's causing the direct threats, including specific human actions? You might also explore any special opportunities on which you can capitalize—for example, if a friendly board of supervisors that really cares about your issue is in power, or land prices have fallen and part of your strategy might be to purchase land.

Oiled beach   Gerry Ellis

When I hear of the destruction of a species, I feel just as if all the works of some great writer have perished.
—Theodore Roosevelt

Identify Threats to Your Targets

A society is defined not only by what it creates, but by what it refuses to destroy.
—John Sawhill

In this step you need to think about what is causing the problems for your target. For example, is it habitat loss or fragmentation, urban sprawl, overfishing, illegal hunting, pollution, or some other issue?

If you want to protect a conservation target, whether a biodiversity or a human welfare target, you need to know why it is in trouble. Members of your team will have a good idea of what threats are contributing to the decline of your targets. But you also might need to gather more information to identify the most urgent threats and talk to a number of stakeholder groups.

Threats can either be human activities that directly degrade the target (for example, habitat loss because of development) or they can be natural processes that have been altered by human activity such as decreased frequency of wildfire because of fire suppression or global warming that has been exacerbated by human-induced carbon emissions.

Examples of Threats

Direct human-caused threats:

• Habitat loss (can also be caused by natural events, but often the result of human actions)
• Habitat fragmentation
• Pollution
• Overgrazing
• Overhunting

Altered natural processes due to human activity:

• Fire suppression resulting in a change in forest or prairie composition
• Human-induced global warming resulting in habitat shifts
• Altering the natural flood regime with dams or dikes or other flood control structures resulting in lack of cottonwood regeneration

See **Tool #10** on page 133 in **Section E** for an activity that can help you identify the threats to your selected targets.

It's always helpful to work through the threats with your team. You will discover what everyone collectively knows, where there might be gaps, and if you might need additional expertise. There are a number of ways to do this type of brainstorming, but all involve thinking about each of your conservation targets from different perspectives.

Some people advise not to list more than 10 direct threats for each target so that you are focusing on the main issues. (It can also be difficult to work with more than 10 at a time.) After you've listed the threats, conduct a threat analysis. This toolkit provides a brief overview of conducting a threat analysis, but it does not provide extensive detail because many others have written on it. (For example, see IUCN's classification of direct threats or the Open Standards, available online at: cmsdata.iucn.org/downloads/sc-shandbook_2_12_08_compressed.pdf or conservationmeasures.org/wp-content/uploads/2010/04/CMP_Open_Standards_Version_2.0.pdf)

Threat Analysis:

Think about the threats to your target using the information you have, the expertise in the room, your partners, your advisory board, and your stakeholders. You can also do a rough prioritization by asking yourself these questions:

- How **severe** is the threat? How much damage to your targets will it cause?

- How **urgent** is the threat? If you don't do something now, will it just get worse? How much of an emergency is it?

- What's the **scope** of the target that is affected by the threat? For example, how much of an ecosystem is impacted by the threat? How much of a species' population is affected?

- If you don't do something now, will you be able to turn the situation around in the future? How **irreversible** is the impact? For an ecosystem, can you restore the habitat? For a species, can you bring back the population if the threat is removed? Or is the potential damage irreversible?

Dig into the Root Causes

"People don't change their behavior unless it makes a difference for them to do so."
—Fran Tarkenton

As you review the threats impacting your targets, you'll be able to list a number of actions that individuals or groups of people are doing that are causing the threats or directly impacting your targets. These are called the **root causes** or **contributing factors**.

Take the Chihuahuan Desert, which straddles the southwestern United States and Mexico. This desert ecoregion is rich in biodiversity and supports a number of species found nowhere else in the world. The threats to this amazing place include lack of water resources, zoning problems that allow for overde-velopment, land policy issues in the both the United States and Mexico that provide limited incentives for people to protect their land, harvesting endangered species, including cacti, and many other problems.

If you just take the issue of water, you'll find that there are many human behaviors affecting water resources including:

- Individuals using too much water in and around their homes every day (everything from washing clothes to watering lawns)

- Policies that allow farms and ranches to draw large amounts of water from the Rio Grande watershed and other waterways that historically have provided necessary water to the Chihuahuan Desert

- Individuals and communities using too much oil, gas, and other fossil fuels, which contribute to global warming. Global warming can alter temperature and rainfall patterns, resulting in less precipitation in key areas during the short, but critical, rainy season.

If you consider the first bullet and list why people are using too much water, you might get a list like this:

- There's no incentive or disincentive to use less water—in other words, there's no positive feedback for saving water and no fine for wasting water.

- It's easy to turn on the water and use as much as you want, even when that's more than you need.

- It's hard for people to know how much water they are using because quarterly water bills don't specify quantity or put it in context of what's "too much" or "just right."

- Water is inexpensive because the price is artificially low, and doesn't include the full cost of what it takes to regulate and maintain water supplies.

- People don't know that using too much water is a problem and they don't have strategies for reducing water use.

- Some people's livelihoods depend on irrigation (and need water) and they value that more than they value the Chihuahuan ecosystem.

- Many industries don't have water-saving policies in place because water use is not their biggest cost issue. In some instances, there actually can be an incentive to use more water because changing the current practices would be more costly than saving water.

As this example shows, there can be many threats to a biodiversity target and many reasons why people are acting the way they do. It's important to consider the root causes so that any strategy or action plan is focused on the actual problems. A root cause analysis can also help you identify and prioritize the audiences that are most strategic for your work.

Think through each of the threats you've identified, and then try to identify the root causes for each of them and the human behaviors that are contributing to the threats. One way to identify the root causes is to conduct a group brainstorm that encourages in-depth thinking about the underlying reasons for each threat. Once you know the root causes, it is important to prioritize among them and decide which ones you will address.

Gerry Ellis

See **Tool #11** on page 135 in **Section E** for help with identifying the root causes of the problems facing your targets.

For an activity you can use to prioritize and select the root causes you want to focus on in your planning, see **Tool #12** on page 136.

Root Causes: Mike Matarasso, from Conservation International, defines root causes as the reasons people conduct a particular behavior. For example, if hunting is identified as a harmful behavior that is causing the decline of a species, the root causes of hunting (why people do it) might be: consumption (people need the food), income (people need the money), trophies (people want to show others what they've done), or social norms (families have been hunting for generations—it's a way of life).

Understanding the Context:

As you're digging into the root causes of the problems, you might find that you still need to understand more about the community or issues that you're focusing on. This is why it's so important to have an interdisciplinary team and partners who bring different perspectives to the analysis. The root cause analysis helps you make sure you're accounting for the biological, social, economic, political, and cultural factors of a situation. The amount of time and the additional expertise depends on the size of the project, the expertise in your group, and what other factors you need to consider.

In some cases, you might want to do a community assessment to find out more about the situation. For example, you might want to find out more about:

- Community boundaries
- Community capacity and activism
- Community interaction and information flow
- Demographic information
- Economic conditions and employment
- Education
- Environmental awareness and values
- Governance

- Infrastructure and public services
- Local identity (and culture)
- Local leisure and recreation
- Natural resources and landscapes
- Property ownership, management, and planning
- Public safety and health
- Religious and spiritual practice

From Community Characteristics (U.S. EPA, 2002)

See **Tool #5** in **Section E** on page 122 for more about how to conduct a community assessment.

Hurdles and Opportunities:

After you've analyzed the threats and root causes, it helps to pause to look at opportunities you have at this moment that you don't want to miss as well as any obstacles that you should avoid.

As you work through identifying threats, root causes, and the human behaviors that are threatening your targets, you will also find out information important to your planning process. For example, you might find that some barriers to change are insurmountable. Restoring the flooding regime along stretches of the Mississippi River would require removing dikes and other flood control structures. Removal of these structures would subsequently threaten many communities along the river. As ecologically desirable as it might be to restore bottomland hardwood forests, the consequences are too severe and the barriers too great. It also might be a challenge that your organization and your partners don't have the capacity to address at this time.

In other cases, important opportunities will emerge from the process of identifying threats and root causes. For example, in the arid west, riparian habitat is often degraded by cattle grazing near rivers and streams. The underlying causes are fairly simple: the ranchers need to earn a living and cattle need water. The challenge and opportunity is to find an alternative source of water away from the riparian habitat. This root cause exposed an opportunity and enabled creative partnerships between conservation groups and ranchers to establish solar-pump watering tanks as well as providing fencing to exclude cattle from the habitat.

The Bottom Line

To be successful in your conservation project, you'll ultimately need to alter the behavior of those contributing to the problems. Understanding why your targets are in trouble is critical. And examining the underlying causes or motivations for the current situation is essential. Dig deep now so that you truly understand the root causes of the problems. Be sure to think about the problems from diverse perspectives, including ecological, social, cultural, and economic angles.

Ask yourself the following questions:

- What are the direct threats to your targets? Consider all the reasons why your targets are in trouble or need to be protected.

- For each threat, dig into the root causes that are motivating the behavior or have the potential to cause harm to your targets.

- For each threat, identify meaningful opportunities as well as potentially insurmountable barriers. This will be helpful as you plan your strategies.

- What characterizes this community? What makes it tick? Consider conducting a community assessment to gather the information you need to really understand the communities and people you will be working with.

If everything seems to be going well, you have obviously overlooked something.
—Steven Wright

Hold fast to dreams, for if dreams die,
life is a broken winged bird that cannot fly.
--Langston Hughes

Genius is more often found in a cracked pot than in a whole one.
—E. B. White

Section C. **The People Factor**

Step 11   Identify Your Target Audiences

Step 12   Think About the Long Term

Step 13   Figure Out What You Want People to Do

Step 14   Find Out What Makes Your Audience Tick

Step 15   Create Compelling Messages

The most important single ingredient in the formula of success is knowing how to get along with people.
—Theodore Roosevelt

4

Who Do You Need to Engage and Why?

There are no passengers on Spaceship Earth. We are all crew.
—Marshall McLuhan

Conservation is about creating change. It's about people and society as a whole, changing their behaviors and stepping up to make a difference. As conservationists, our job is to provide the opportunities, support, and inspiration to create that change. But who needs to do the changing? One of the most critical parts of the planning process is figuring out who you should be targeting for your program.

This is tricky because most environmental problems are caused by a complex web of threats and human behaviors. It can be very hard to decide on the audience(s) that make the most sense for your project, budget, expertise, and circumstances.

Before you try to change others, remember how hard it is to change yourself.
—Bill Bluestein

Identify Your Target Audiences

The odds of hitting your target go up dramatically when you aim at it.
—Mal Pancoast

Most communication efforts target too many people. The smaller the audience target, the easier it is to create a focused campaign that will move the audience to action.
—Kristen Grimm

When thinking about your audience, go back to your threats and root causes. Which audiences are causing the problems? The audiences who are directly causing the threats or causing problems for your targets are called the **drivers.** Who can best reach the driver? Your **target audiences** will probably be a mix of drivers (those directly causing the problems) and others, who can influence the people causing the problems, sometimes called **influencers.**

One way to hone in on the audiences that can best help you achieve your goals is to develop a matrix that outlines the key behaviors on one side, and then looks at who is directly causing the problem. These drivers can be an individual (such as a key politician or community leader who is responsible for a specific action) or a group of people who are taking actions that are negatively impacting a biodiversity target or human welfare target (such as landowners who use pesticides with runoff into a water system or a group of politicians who are stopping legislation from being passed to protect an endangered species), or that are directly or indirectly harming a biodiversity target. For example, in some communities around the world, a religious leader might be able to influence a group to change their behaviors. Or you might focus on a politician, a developer, and so on.

Next, you can list the audiences who you think make the most sense to target to stop the destructive behavior or start a more sustainable behavior. These can be the drivers (those directly causing a problem) or the people who can influence the drivers. Your target audiences will depend on who can actually help protect your conservation targets and who you have the capacity to reach.

Behaviors	Drivers (who's causing the problem)	Possible Target Audiences	Priority Audiences and Why
Allowing overgrazing of riparian habitat	• Ranchers	• Specific ranchers • Policy makers • Neighboring ranchers who are sympathetic to your cause	• The ranchers who are allowing the grazing, because they are the ones who ultimately control their land and how it is managed
Allowing invasive weeds to grow and spread	• Landowners whose land is overrun with invasive weeds	• Landowners whose property has weeds • Neighboring property owners	• Landowners in the ecoregion because eradication of weeds needs to be a collective, unified effort
Polluting waterways with nitrates and phosphates causing nitrification and anoxic zones in the Gulf of Mexico	• Farmers in the Midwest who annually till and fertilize their fields • Homeowners who fertilize their lawns	• Farmers • Extension agents • Agricultural associations • Lawn owners • Landscape businesses	• Farmers and landowners who regularly use fertilizers because this behavior contributes directly to the problem
Burning fossil fuels	• People who drive cars and trucks • Homeowners • Commercial building managers	• Vehicle owners • Automobile manufacturers • Homeowners • Building managers • Local politicians	• Vehicle owners and homeowners because they are most directly capable of changing behaviors • Politicians because they are most capable of creating sustainable energy policies for the region

See **Tool #13** on page 139 in **Section E** for guiding questions and a worksheet to help you complete a target audience matrix. Also see **Tools # 14** and **#15** on pages 141 and 142 for more information and activities that will help you select your target audiences. And see **Tools #16** and **#17** on pages 143 and 144 to help you understand your specific target audiences and how to best work with them effectively.

What's a Target Audience?
A target audience is a segment of the population that has a specific opportunity to take action on the problem you have identified. The target audience may also be a segment of the population that is *specifically* affected by the problem you have identified. For example, homeowners have a specific opportunity to reduce the amount of nutrients that get into waterways. A lake in the neighborhood that has a super abundance of nutrients results in an unattractive recreational resource—*specifically* affecting the quality of life for the homeowners in the neighborhood. Homeowners are the target audience in either case. If the welfare of fish or wildlife in the lake is the primary concern, you will need to choose whether to communicate about the ecosystem problem or focus, instead, on the interests of the target audience—that is, the benefits of an attractive recreational resource. (University of Wisconsin Cooperative Extension)

Think About the Long Term

The best way you can predict your future is to create it.
—Stephen Covey

To achieve conservation success, we need to consider two time frames at once. We need to address the urgent problems that are threatening biodiversity and human livelihoods today. And we need to think about how to sustain success over time and create a citizenry that has the knowledge, skills, and motivation to tackle new environmental issues in the future. As you're thinking about your target audiences, it helps to think about short-term strategies, as well as longer-term strategies. Both involve people. And both require education and/or some other social engagement strategies. So in addition to thinking about priority audiences in the short-term, it's also important to look at your threats and root causes and identify audiences that you may want to target for a longer-term sustaining strategy.

For example, after looking at the root causes and human behaviors that are contributing to the threats or harming your targets directly, you might see problems like this that are contributing to the problems:

- Lack of understanding
- Lack of information
- Lack of public awareness
- Lack of concern for the issue
- Lack of public support for new policies
- Lack of diverse board members, staff, elected officials, and members
- Lack of elected representatives who support the initiatives you are working on
- Lack of diversity in the environmental movement
- Lack of skills in helping to address the problem
- Lack of access to education, health care, and other basic opportunities

These types of issues indicate a need for longer-term strategies that will help change behavior, foster skills, and build will for action. And it's often education and outreach strategies that address the need to change societal values.

Think about the audiences you would like to target for long-term change—to continue to build a conservation constituency that reflects the demographics of the community and will be able to address both current and future environmental threats.

Gerry Ellis

Environmental Education promotes attitudes and value systems that influence environmentally ethical behavior by developing understanding, skills, and values that will enable people to participate as active and informed citizens in the development of an ecologically sustainable and socially just society. —UNEP

Charting the Future

Conservation is humanity caring for the future.

—Nancy Newhall

Take time now to think about how you will work to shift values and attitudes and build skills and motivation. By considering long-term strategies as well as short-term strategies, you will be working to sustain your short-term goals. In some cases, your organization can do both; in others, it will take partnering with other groups.

For example, if you are working on a project to get building managers to turn off the lights in buildings during spring and fall migration, here are some of the audiences you might want to target. To sustain any short-term successes, you might want to make sure that younger people understand the relationship between the built environment and the natural environment, and how to design buildings that protect human interests and biodiversity interests. This project will not only protect migrating birds, it will also lower energy use in the buildings, which can help address global warming.

Priority Audiences	Shorter Term	Longer Term
City Managers	Need to be on board so we can pass legislation for city-run buildings	Could cities save enough money on energy costs to encourage long-term support?
Building Managers (government buildings)	Need buy-in so that all building managers feel good about turning out the lights and need to address issues, such as worrying about crime, etc.	Future training for building managers should include a conservation component
Local Business Leaders	Might help provide incentives to encourage specific actions in the short term	Their support is important to long-term change. May ultimately want to encourage other businesses to shut their lights off too.
Other Conservation Groups	Groups can help support and publicize the cause	
K-12 Educators	Educators can help support efforts and help their students understand the relationship between migration and buildings, as well as energy and climate change	Issue provides a great hook to get young people involved in supporting this initiative as leadership changes. Can students help in some way with monitoring success?
Business Schools		Could be a good case study to help future business leaders think about this issue

Figure Out What You Want People to Do

You want to make it easier to do something you want done and harder not to.
—Peter Bregman

It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.
—Charles Darwin

Since conservation is about change, you need to know what it is that you want your audience to do: What actions do you want them to take? What behaviors do you want them to change? Put quite simply, what do you want them to do that will make a difference?

What are alternative behaviors or solutions that would help reduce the threats or help the target directly? And what are the barriers that are preventing people from stopping a destructive behavior or adopting a new one? For example, if people in a community are dumping their oil down the drain, it would be helpful to think about alternatives that would include an incentive for bringing their used oil to recycling sites instead. You could also mark the drains, as many communities have done, to help people see that what they dump down the drain ends up in the bodies of water that provide wildlife habitat and drinking water for people.

For some projects, you can identify the alternatives with your core planning team. But it may be more productive to involve representatives from your target audiences—to get their ideas, to discuss alternatives, and to understand their barriers to change. You can do this in meetings, a workshop, with surveys, interviews, focus groups, or other interactions.

For each of your identified audiences, be deliberate about defining the specific actions you want them to take, including the new behaviors you want them to adopt. You'll also need to learn more about what motivates the current negative behavior as well as what barriers exist to adopting alternative behaviors. (See the next chapter to learn how to find out more about what your audience knows, cares about, and needs.)

Eventually you will need to do this for any program you undertake that seeks to inspire conservation action. But start initially with what is feasible—don't bite off more than you can chew. For whichever threat you have decided to focus on, take your top two or three target audiences and outline the behaviors that are negatively impacting the target, the motivations for those behaviors, alternative behaviors, and barriers to change.

Options Matrix

One way to think through the barriers and alternatives is to fill out an **Options Ranking Matrix.**

Ask yourself:

• Does the alternative provide the same benefits as the target behavior?

• Does the alternative have a positive or negative impact on the environment?
  (Participants will assess this with guidance from an expert.)

• Are there any barriers to adoption of the alternative that can't be overcome?

Think about options for each behavior you're hoping to change. Go back to the threats and root cause analysis to identify which behaviors you want to focus on.

For each target behavior, it's important that your group members brainstorm and identify sustainable alternatives to the current practice. Then, you can use your root cause analysis to help identify the uses, benefits, environmental impacts, and barriers to adopting each alternative. To get a feeling for this process, consider the sample options matrix, on the next page, which explores alternatives to cyanide fishing.

Options Matrix: What are the Alternatives?

	Target Behavior: Cyanide Fishing	OPTION #1 Grouper Aquaculture	OPTION #2 Seaweed Culture	OPTION #3 Pelagic Fishing	OPTION #4 Agriculture Options
USES/BENEFITS OF THE BEHAVIOR	• Provides income • Practical • Easy to get cyanide • High price for fish caught	• Buyer ready for product • Equal income • Provides labor	• Good income potential • Good market	• No coral reef harm • Income • Market exists	• Long-term income • Alternative for main food staples • Natural medicine source
ENVIRONMENTAL IMPACT OF THE BEHAVIOR	• Kills coral reef • Kills other fish • Disturbs marine ecosystem • Causes human health issues from potassium consumption	• Food for grouper is bombed fish • If collecting larvae from wild, impacts wild stock	• Can destroy coral if sea-weed lines tied to bottom • If stakes are made of mangrove, mangrove damage		• Potential loss of habitat and impact on biodiversity
BARRIERS TO ADOPTING NEW OPTIONS		• Lack of capital	• Disease • Lack of knowl-edge about how to deal with disease • Lack of skills • Fish stocks so high that fish eat the seaweed	• Lack of capital • Ice blocks hard to get • Unstable income • Lack of access (transportation)	• Need seeds • Need time • Lack skills for cultivation and harvest • Pest management • Unstable prices
HOW TO OVERCOME THE BARRIERS		• Find a finan-cial backer who sees promise in this strategy • Work with other groups to write a proposal to a foundation who focuses on marine and coral reef issues	• Provide incentives for seaweed cultivation • Provide technical assistance to help address lack of skills		

Source: Targeting Behavior, Mike Matarasso, Conservation International, 2008.

After completing a brainstorming chart with the group, determine how you can overcome the barriers. For example, in some cases, will an education or communication strategy work? Is a policy option needed? And if so, what public support will you need? Which individuals need to be targeted? What other strategies need to be considered to help address the problems?

It's also important to evaluate which options will have the greatest impact on the program, are the most economically and politically feasible, are culturally acceptable, are compatible with social norms, and that will have the most immediate positive results. You can pick one or more alternatives. You'll find that it's often a suite of complementary activities that replace the unsustainable behavior.

Incentives Count!
For some audiences to adopt a new behavior, they need some type of incentive. Conservation incentives can include technical assistance, investment in alternatives, support for social services, employment opportunities, and so on.

Before you can truly understand the barriers and what it might take to overcome the barriers, you need to understand your target audiences. See Chapter 5 for more about how to get to know your audience.

We can begin by doing small things at the local level, like planting community gardens or looking out for our neighbors. That is how change takes place in living systems, not from above but from within, from many local actions occurring simultaneously.
—Grace Lee Boggs

The Bottom Line

One of the most important decisions you will make in your project planning will be identifying your target audiences. Who will you target and why? What do you want them to know, feel, and do? What specific behaviors do you want them to change or adopt? What are the barriers to change?

Ask yourself the following questions:

- Which individuals or groups are the drivers— or are the people directly causing problems?

- Are there people who can influence the people causing the problems?

- Strategically, which audiences do you want to target? (Your target audiences might also be drivers.)

- Which audiences can help you achieve long-term behavior changes?

- What motivates the current action or behavior?

- What are alternative behaviors that you want your target audiences to adopt?

- What are the barriers to getting your audiences to change their behaviors?

- How can you overcome the barriers?

5

Getting to Know Your Audience

The noblest pleasure is the joy of understanding.
—Leonardo da Vinci

Now that you know who you need to reach, what behaviors you hope to change, and what actions you want your audience to take, it is essential to understand more about what makes your audience tick: what do they care about? Why are they behaving the way they do? What limitations exist that might prevent new and better behaviors?

Consider the target audiences you identified in the last chapter. Do you know what might influence them to change their behaviors? Do they share values with each other or your organization that might help your cause? Do you know why they might or might not act?

This chapter highlights strategies for getting to know your audience. The better you know your audience, the more likely you are to experience success with your project. As anyone who works with people—from magazine editors to lawyers—knows, understanding your audience can mean the difference between success and failure.
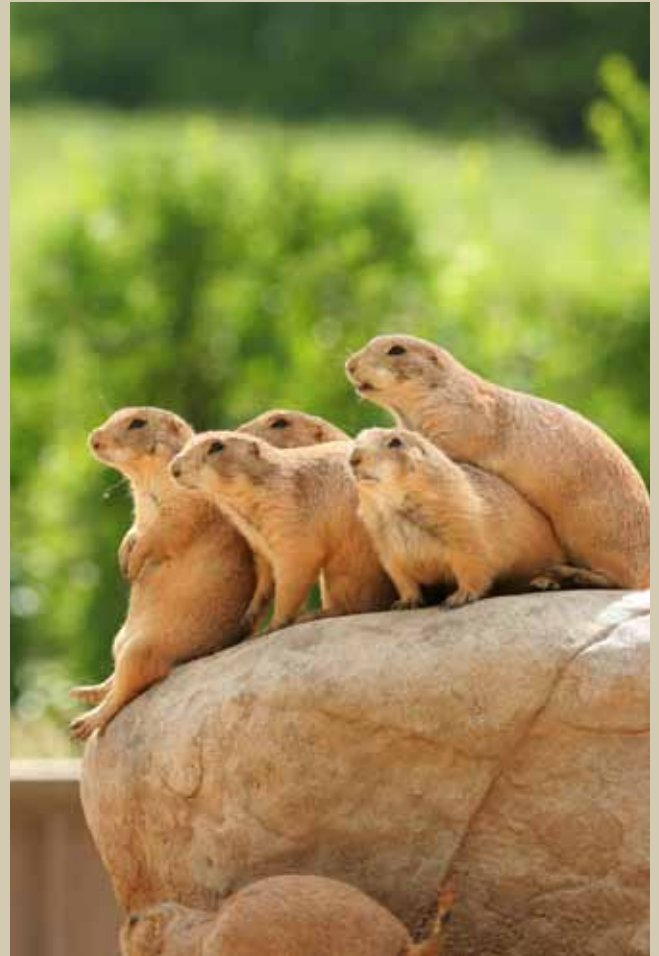
Prairie dogs

There is a great difference between knowing and understanding: you can know a lot about something and not really understand it.
—Charles F. Kettering
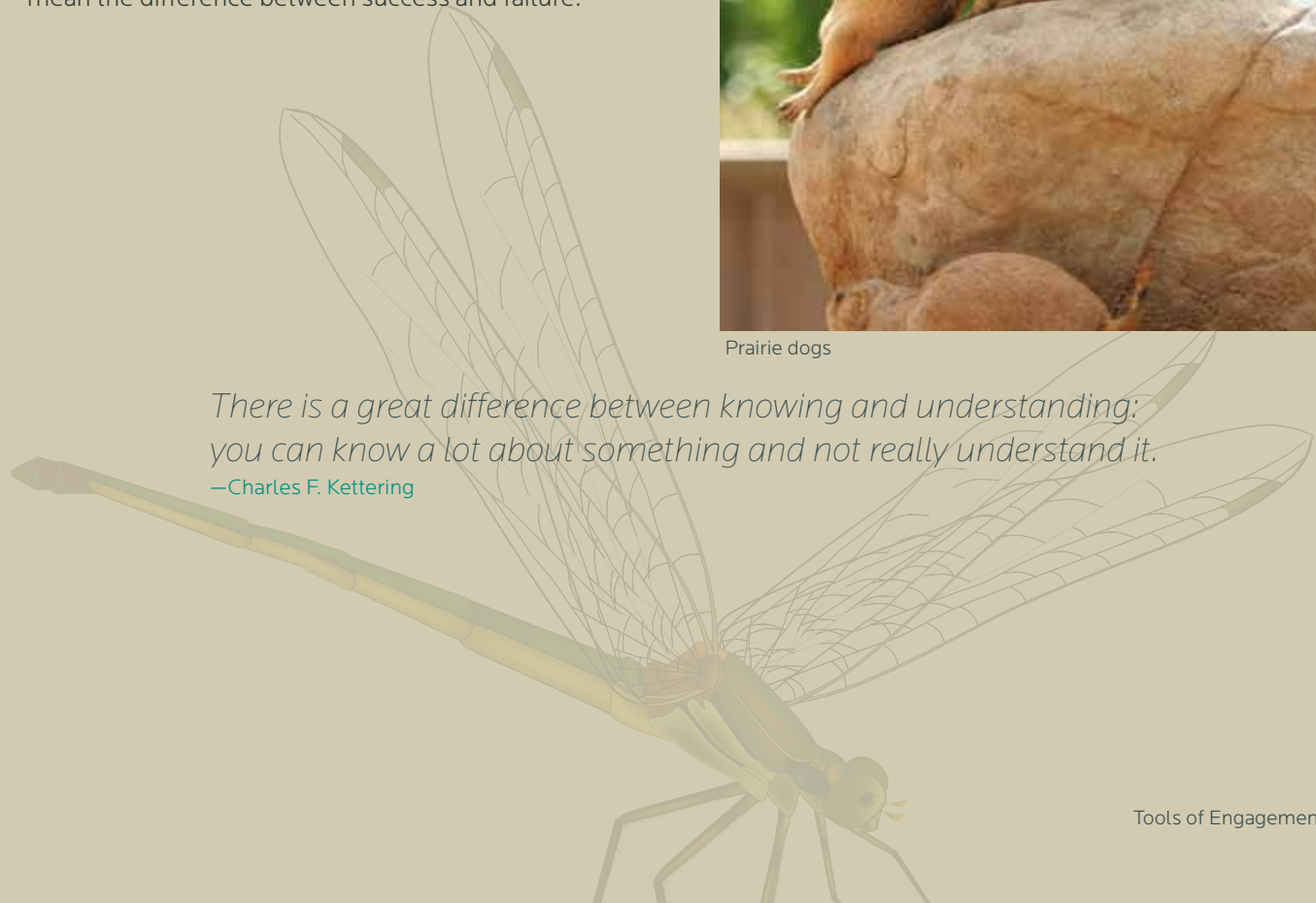
Find Out What Make Your Audience Tick

When an elder dies, a library burns.
—African Proverb

How many times have you made assumptions about someone and later realized you were way off? The same thing can happen when you think about your target audiences. You might think you know an individual or a group or a community because of what you've heard, but you need to make sure that you ground truth your assumptions to really put an effective plan into place.

Basic information about your audience's demographics can often be found from census data or from schools and school districts. But understanding other characteristics of your audience—its members' values, attitudes, beliefs, knowledge, behaviors, barriers to action, and so on—can be more difficult.

It's critical to understand your audience relative to the conservation issue you're working on, and what role the audience plays in causing the problem and/or participating in the solution. It's also important to be clear about what behavior you hope to change, and what barriers your audience might face in making that change. The key to your project's success lies in your ability to remove the barriers and inspire a change in behavior.

Kids tasting panda bread   Gerry Ellis

You really can change the world if you care enough.
—Marian Wright Edelman

Understanding Diverse Perspectives

Researching your audience is especially important if your team does not have a history of engaging with a particular group, such as people of color, Native Americans, low-income neighborhoods and schools, and religious organizations, among others. Building relationships with communities that have not been involved in the mainstream environmental movement is critical for expanding conservation efforts and achieving better results.

Many of these communities have traditions and experiences that can inform our work. For example, to work with indigenous cultures in the Arctic, it would be important to understand what traditional knowledge is and how it differs from non-indigenous knowledge. The Alaska Native Science Commission (ANSC) describes traditional knowledge as knowledge that is practical, based on teachings and experiences passed on from generation to generation. It is also:

- **Knowing the country.** It covers knowledge of the environment—snow, ice, weather, resources—and the relationships between things.

- **Holistic.** It cannot be compartmentalized and cannot be separated from the people who hold it. It is rooted in the spiritual health, culture, and language of the people. It is a way of life.

- **An authority system.** It sets out the rules governing the use of resources—respect, an obligation to share. It is dynamic, cumulative, and stable. It is truth.

- **A way of life.** Wisdom is using traditional knowledge in good ways. It is using the heart and the head together. It comes from the spirit in order to survive.

- **A source of credibility to the people.**

If you're a scientist working with indigenous cultures, it is important to understand how your partners view indigenous knowledge, including how they might see it as different and complementary to "western" scientific knowledge.

Indigenous Knowledge	Scientific Knowledge
– assumed to be the truth	– assumed to be a best approximation
– sacred and secular together	– secular only
– teaching through storytelling	– didactic
– learning by doing and experiencing	– learning by formal education
– oral or visual	– written
– integrated, based on a whole system	– analytical, based on subsets of the whole
– intuitive	– model- or hypothesis-based
– holistic	– reductionist
– subjective	– objective
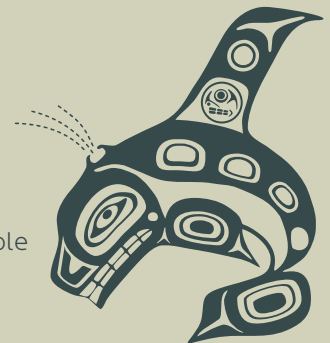
Traditional Knowledge

The indigenous people of the world possess an immense knowledge of their environments, based on centuries of living close to nature. Living in and from the richness and variety of complex ecosystems, they have an understanding of the properties of plants and animals, the functioning of ecosystems, and the techniques for using and managing them that is particular and often detailed. In rural communities in developing countries, locally occurring species are often important sources of foods, medicines, fuel, building materials and other products. In addition, people's knowledge and perceptions of the environment, and their relationships with it, are often important elements of cultural identity.

—Federico Mayor Zaragoza, former Director General of UNESCO

Social justice and environmental conservation are inextricably linked. One reason to prioritize outreach to communities of color and low-income communities is because they are often most impacted by environmental problems. For decades, these communities have borne the brunt of environmental damage, including toxic dumping, contaminated water supplies, lead paint, and pesticide exposure. Many of these communities have also been the target of research projects, but don't learn the results or what it means for their communities.

Tricks of the Trade: Learning More About Your Audiences

Common methods for learning more about your target audiences include **surveys, interviews,** and **focus groups** or **meetings**. Conveniently, these are some of the same tools you will likely use to evaluate your program, and your original audience research can provide a baseline for future research into how effective your program has been.

Depending on your budget, one or more of these methods may be more appropriate. If you have sufficient funds, you may decide to hire an experienced outside group to conduct the research for you.

Regardless of the method you choose, think of this as an opportunity to get your audience members involved. If you conduct surveys, interviews, or focus groups openly and transparently (so that your research subjects know what you're doing and why you're doing it), you can start to build trust. You'll also help ensure that your program succeeds in being relevant to your audience, meeting their needs, and achieving your goals.

You may choose to conduct your research not just with members of your target audience, but also with others who are familiar with that audience, such as service providers, health professionals, local leaders, teachers, parents, and so on. (In fact, should you decide to go a step further, partnering on your program with a group that already works with your target audience can help improve insight, credibility, and access to the audience.)

For example, a program designed to integrate environmental education and service learning into a district school system may focus on the following audiences:

- Educators
- Master teachers or department supervisors
- Students
- Administrators
- Parents
- Members of the PTA
- Organizations and agencies that work with schools
- Elected officials who care about education
- Businesses
- Family foundations that might contribute to your program
- Health professionals (to support the link between healthy kids and a healthy environment)

Education is the most powerful weapon that you can use to change the world.
—Nelson Mandela

And here are some of the audiences you might want to think about engaging before conducting a community social marketing campaign to get people to choose renewable energy sources:

- Consumers in the targeted areas, segmented by those who use renewables, those who don't, and so on
- Power companies that are providing renewable energy options
- Businesses that might support the campaign
- Journalists who are interested in energy and economics
- Leaders or local celebrities who can be your champions for a campaign (and who support renewable energy)

More About Research Methods

There are many tools that will provide more information on your target audiences. Each of these has strengths and weaknesses; therefore, it's ideal to combine several methods to create a more holistic understanding of your audiences. This section provides a brief overview to introduce you to the range of tools you might consider when conducting an audience assessment. Many resources exist to help you learn more about using these tools.

Surveys

Surveys allow systematic collection of information from a sample of people. If your target audience is small enough, you may wish to survey all members; if it is large, you'll want to carefully select a certain portion of members to include in the survey. Surveys can be conducted on site (for example, at a school whose students are your target audience), through the mail, over the phone, or online. Tools such as surveymonkey.com make surveys easy to develop, administer, and analyze.

Here are a few tips for writing effective surveys:

- Keep the survey short (a general rule of thumb is that they shouldn't take longer than 15 minutes to complete, although closer to 5 minutes is ideal)
- Use simple and understandable words and questions
- Start with interesting questions to keep people engaged
- Avoid the use of leading questions
- Limit the response options
- Use closed-ended questions as much as possible
- Pre-test your survey with your target audiences, if possible
- Put the questions in a logical order
- Include an engaging, but short, introduction explaining the purpose of the survey and why it's important for people to respond
- Consider offering an incentive to people who complete the survey before the deadline

For help designing valid, reliable surveys, see Don A. Dillman's book *Mail and Internet Surveys: The Tailored Design Method.* (Wiley, 2000)

Interviews

Interviews can provide more in-depth information than a survey. You can conduct structured interviews, which strictly follow an interview guide. Or you can conduct unstructured interviews, which use a guide more loosely and allow interviews to proceed in different directions.

An important but simple strategy when interviewing people is to ask how, not why. Asking why tends to provoke a defensive response. "Why?" can come across as demanding a justification for the subject of the question. "How" is less threatening. So instead of asking, "Why do you plant non-native species in your yard?" ask, "How did you come to use exotic species in your garden?"

Another valuable tip is to avoid questions that can be answered with a simple "yes" or "no." Asking probing questions that require a more detailed response will provide more nuanced data and more information to inform your program design.

The downside is that interviews can be more time-intensive than surveys. Interviews require time for scheduling and conducting, and also can produce copious amounts of data that may be challenging to analyze. Therefore, interviews are more expensive to conduct and tend to have smaller sample sizes than surveys.

Before you conduct an interview, it's important to find out the most culturally appropriate way to do it. For example, depending on where you are working, consider the following:

- Is it more polite to look directly at a person or should you avoid eye contact?

- How should you dress when you're interviewing someone in the community or talking to community members?

- How much time do people expect you to spend on initial greetings and getting to know each other before launching into the interview?

- Are there subjects like religion or policy that might be considered inappropriate?

It's also critical to prepare for an interview. Think about where you will meet and find a place that will be quiet and comfortable. Make sure your interviewees understand the purpose of the interview before you meet so they aren't surprised. Also let them know how long you think the interview will last. Some people will want to know how the information will be used and whether what they say will be confidential. Some may ask to review any quotes that will be published.

Gerry Ellis

After you've completed the interview, be sure to ask interviewees if they have any questions. Finally, provide your contact information so that they can contact you with further thoughts. If you are conducting a number of interviews, it helps to keep good notes and to type them up after you finish each interview.

When you're thinking about the types of questions you might ask, consider what type of information will help you learn more about your interviewees and their perspectives on your issues of interest.

According to veteran qualitative researcher Michael Quinn Patton, there are six basic types of questions:

1. **Behaviors:** Questions that ask about what a person has done, is doing, or will do

2. **Opinions/values:** Questions that ask what a person thinks about a topic (looking for what someone cares about or believes in)

3. **Feelings:** Questions that probe feelings related to an issue. Note that interviewees sometimes respond to "feelings" questions with "I think ..." so be careful to note that you're looking for feelings

4. **Knowledge:** Questions designed to elicit facts about a topic

5. **Sensory:** Questions related to what people have seen, touched, heard, tasted, or smelled

6. **Background/demographics:** Questions that focus on standard background information including age, education, and ethnicity

For more information on designing and conducting interviews, see Herbert and Irene Rubin's book *Qualitative Interviewing: The art of hearing data* (Second Edition, Sage Publications, 2004) and *Field Guide to Nonprofit Program Design, Marketing, and Evaluation* by Carter McNamara. (Authenticity Consulting, 2006)

Focus groups and meetings

Focus groups, public meetings, and advisory committees comprised of target audience members can all provide useful information about your target audience at the same time as fostering audience support and participation in your program.

A focus group is essentially a group interview in which respondents interact with each other as well as the interviewer. Focus groups are guided by a facilitator who initiates the discussion on particular questions. It's helpful to have a second researcher observing the focus group as it is difficult to both facilitate and observe.

You might want to videotape or otherwise record focus groups for later analysis. (Videos are particularly useful since they capture body language, which may be informative.) However, videotaping can also make people feel uncomfortable, so it's important to ask permission beforehand and let respondents know if you're planning to record them.

The physical setting can also help or hinder the discussion. For example, large tables can create a barrier between the facilitator and the participants. Review the space ahead of time to ensure it is comfortable and appropriate for your purpose. The best focus group set-ups feel like casual settings, with a café- or living-room-like character.

As with surveys and interviews, you can use focus groups to explore your audience's general attitudes, beliefs, and behaviors, as well as their specific attitudes, beliefs, and behaviors regarding the issue you're hoping to address. Focus groups are the most time- and resource-intensive of the three research methods outlined here, but they can provide the most detailed picture of your audience—at least, of those people whom you are able to include in your meetings.

Resources: For more information about conducting focus groups, see D.W. Steward, P.N. Shamdasani and D.W. Rook's book *Focus Groups: Theory and Practice.* (Sage Publications, 2000) You can also find quick-to-read, easily digested information about conducting focus groups in the "Tips and Tricks" section of "The Activation Point Research Debrief" by the Curious Company.
See "Curious Company Research" at activationpoint.org/downloads.

When developing your questions, remember that people aren't always aware of why they behave as they do, and they may try to rationalize their behavior when asked. One trick for getting around this is to ask why *other* people do things, rather than the person who is answering the question. (Jacobson et al., 2006)

General audience research questions:

- What does your audience already know (or think it knows) about your issue?
- How does your audience feel about your issue (that is, what is their attitude towards it)?
- Does the audience trust your organization? If not, how can you build trust?
- How can you show the audience respect?
- How can you demonstrate that your issue is aligned with your audience's values?
- How can you make the issue more emotionally relevant to your audience?
- How important is this issue to them, and how does it affect their goals for the future?
- What motivates people to care about this issue or its solutions?
- Do people believe any change is likely to resolve the issue?

Questions regarding your targeted (pro-environment) behavior:

- Does your audience need more information in order to take this action, or more will to act?
- Who is already conducting this behavior and are they respected among their peers and the broader community?
- What do people think that others (especially others whom they respect or admire) will think of them participating in this behavior?
- What barriers stand in the way of making the change and which are most important?
- What benefits and rewards would people appreciate receiving from the positive behavior?

Questions regarding problem behaviors you're trying to change:

- Why do audience members adopt or sustain the problematic behavior?
- What and who are the key influences and influencers on the problem behavior?
- What are the barriers preventing audience members from stopping the problem behavior?
- What benefits and rewards for changing their behavior might audience members value?

For more information, link to the sources for these questions:
Spitfirestrategies.com, *Communication Skills for Conservation Professionals* by Susan Jacobson. Also see social science tools and descriptions at wateroutreach.uwex.edu/4SATsTable1.cfm.

Gerry Ellis

The Bottom Line

This chapter just scratches the surface on how to find out more about your target audiences. To help you dig deeper, see Resources in Section F on page 189. The important thing to remember is that even if you think you know your audience, you will probably need to do your homework to really understand them and how they feel about the issues you are working on.

Ask yourself the following questions:

- How much do you know about your target audiences?

- Have you conducted surveys, interviews, focus groups, or meetings to learn more about what they know, feel, think, or care about?

- What are other ways to find out more about your audiences? Are there colleagues, members of the team, or stakeholders who can help you gain access to a group that you have not worked with or is outside of your comfort zone?

- How can you best show respect to the individuals or groups you are trying to influence?

- Have you considered awards or recognition or other incentives that would promote new behaviors and resonate with your target audiences?

- Have you talked directly with your audiences to ground truth the barriers and alternatives you brainstormed earlier?

See **Tool #20** on page 150 in **Section E** for information and exercises that can help your team learn more about your audience and how to work effectively with both friends and foes.

TIPS ON UNDERSTANDING AUDIENCE BARRIERS

Diane Tompkins, president of The Curious Company, and her colleagues have conducted a lot of research on how to overcome barriers, including what people say about the barriers to changing their behaviors. They've found that common barriers include the following:

- I don't have time.
- I don't have hope that change is possible.
- What I do won't make a difference.
- What's in it for me?
- It's not my cause.
- I fear I might fail, be rejected, or be judged.
- I don't relate to the people involved.
- Other people are worse than I am.
- Where's everybody else?
- I can't do everything.
- I'm already doing all I can.
- Sometimes I'm just lazy.

Every audience is different, but in general, more information isn't always the best strategy. Instead, Diane says it's about building a more compelling case for action—one that is strong enough to motivate people to overcome their inertia and to take action.

Overcoming Barriers:

What to **AVOID** when motivating people to act:

- Assuming they're activists who share your priorities.
- Overwhelming them with too much information.
- Guilt-tripping them by forgetting what they're doing right.
- Forgetting they have expertise.
- Forgetting they set their own moral compass.

Overcoming Barriers:

What to **PROMOTE** to motivate people to act:

- Illustrate the end goal.
- Give people hope and communicate your vision.
- Let them know they matter.
- Make the cause relevant and show how it connects to what they care about.
- Make the cause relatable by breaking big issues (like climate change) into smaller, more human-scale chunks.
- Address "What's in it for me?"
- Give them support because they may fear failure.

How to Effectively Lead a Conversation
Diane Tompkins, The Curious Company

It's contagious when you're part of an exciting, dynamic, interesting conversation, isn't it? Time flies, you want to participate, and you're genuinely interested in what others have to say. Together, you come up with new ways of looking at things that no one of you could have done on your own. Well, that's the goal we have for ourselves when we lead any kind of conversation or interview. We want to create an open dialogue that surprises us, takes us to new places, and gives us real insight into both the issues and the people with whom we're meeting. Here are some thoughts on how you can do this.

Opening the Conversation

Welcome the group.

- Remember that the group will have as much energy as you bring to it; what level of energy is appropriate?

- Explain why you're there. Make them feel that there's real purpose to the conversation. If you take it seriously, so will they.

- If it helps to make respondents comfortable, confess weaknesses that you share. *Like you, I say I care about global warming and yet there's so much more I could do to contribute to the solution.*

- Consider introducing the conversation as a "brainstorming session," where there are no wrong answers.

- Let them know that it's OK (and that you expect them) to share different opinions.

- Introduce yourself (and any other co-workers who are there). Model the introduction by offering the same kind of information that you're looking for from respondents (for example, first name only, hobbies, job description, and so on).

- Consider asking if they have any other questions before you get started.
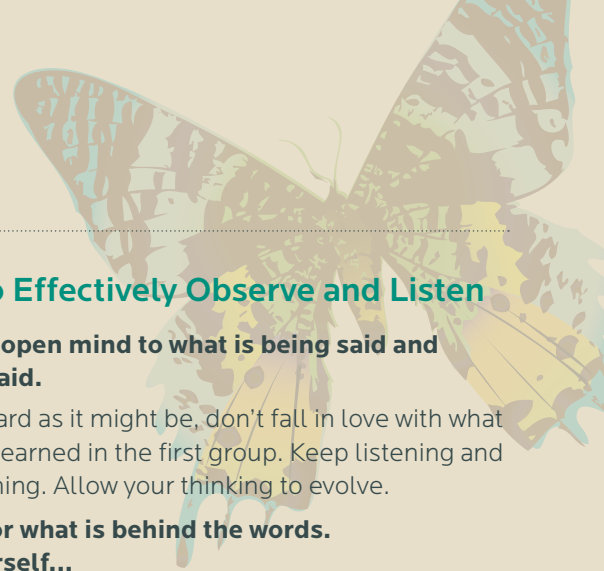
General Guidelines

**Question respondents' language;
don't assume you know what they mean:**

- *How was it "unfair"?*
- *What made it feel "special"?*
- *It's "uncomfortable" because...?*

Constantly clarify:

- *Explain that to me.*
- *Back up and tell me more about . . .*
- *Why?* (You can never ask that too many times, as long as you're not putting someone on the spot.)

If you change the conversation to a completely new topic, warn the group:

- *We're going to put this conversation on hold and shift gears.*
- When changing topics, start with another broad question.

Ask only one question at a time. It's amazing how hard this is to do!

Don't validate their answers—even if you can relate to what they're saying or you think you know what they mean. Make them explain what they're saying to you.

Don't be afraid of silence. It's amazing what will crop up to fill the space. Just sit back and take a few breaths; see who leans in and where they take it.

Give respondents room to discover things. If the insights seem like they're coming too easily or if everyone is saying the same thing, slow down and invite different opinions into the conversation.

Play devil's advocate: *Someone said something very different. He said . . .*

Test your assumptions: *So did I hear you say . . . ?*

- Don't let anyone get away with a contradiction. Call them on it!
- Make sure the group members are talking more than you are.
- Let them know when they're being especially helpful.

Note the progress of the conversation, even if they might not be feeling it.

How to Effectively Observe and Listen

Keep an open mind to what is being said and will be said.

- As hard as it might be, don't fall in love with what you learned in the first group. Keep listening and learning. Allow your thinking to evolve.

**Listen for what is behind the words.
Ask yourself...**

- Are respondents answering with confidence?
- Are they embarrassed?
- What are they holding back or not saying?

Watch the dynamics in the room.

- Instead of focusing on the respondent who is talking, look at the reactions of those respondents who are not speaking. Do they appear to agree or disagree?
- What is the body language in the room? Are they sitting back or leaning forward? Are arms crossed or relaxed? Are people making eye contact or staring at the floor? Is anyone posturing? Is anyone hiding?

Feel the energy from the group.

- Is there passion around any particular topic?
- When do they literally lean into conversation? When do they pull away?
- Where and when do you see the energy dip or peak?
- When are they bonding over shared experiences or shared opinions?
- Ask yourself what's going on when these things happen.

Stay engaged.

- Challenge yourself to constantly be looking for themes woven through all the conversations you hear.
- Look for contradictions. Sometimes a respondent contradicts him or herself; sometimes one group contradicts another. It's all relevant.
- Take a break between groups. Go for a walk. Clear your head.
- Believe that someone might passionately hold a belief that is different from yours.

Have fun!

- It's not often that you get to experience a long discussion with your audience. Enjoy!
- Let the conversation get messy. The moderator might be trying to let respondents find their own energy or take the conversation somewhere he or she hadn't anticipated.

6

Developing Messages That Matter

My life is my message.
—Mahatma Gandhi

Developing compelling messages is critical for any strategy that relies on engaging people. Whether you're developing an education program, a social marketing campaign, or an advocacy effort, it's important to develop messages that are relevant to the audiences you are trying to reach. You'll also want to develop inspiring messages that move the target audience to change, to do something differently. It's essential that you know your own message well enough to be able to deliver it in the form of a "three-minute elevator speech" so that when you talk to others about it—whether for the purposes of raising money or developing new partnerships—what you're saying will resonate and be effective.

Blue-footed booby

In Hell all the messages you ever left on answering machines will be played back to you.
—Judy Horacek

Create Compelling Messages

Colors fade, temples crumble, empires fall, but wise words endure.
—Edward Thorndike

Choosing message frames that are consistent with the values of your audience is one important way to ensure that the recommended behaviors or policies are easier to accept and implement. Energy conservation messages, for example, can use an economic frame ("Taking this action would be an excellent way to save money"); an energy independence frame ("This will help free our country from dependence on foreign oil"); a legacy frame ("This will help protect our children's future"); a stewardship frame ("This will honor your moral obligation to protect the Earth's natural heritage"); a religious frame ("This action will protect God's creation"); or a nationalist frame ("Using this innovative technology will strengthen our nation's economy"). Each of these frames is likely to resonate more effectively with the values of different segments of your audiences, and yet the underlying issue and the desired behavior change is the same.

When developing your messages, it can be useful to ask yourself the following questions:

- What information about the problem or solution will change my audience's perceptions?

- What information do people need about how to implement the solution?

- What information about the consequences of the desired action is not well understood?

- What do people care about? What do they want to change?
  What do they want to remain unchanged?

- What will motivate them to support change?

- What changes in location, opportunity, and service will reduce barriers?

Adapted from Jacobson et al., 2006

Testing Messages with Your Audiences

Once you've fully researched your audiences and developed your messages accordingly, it's critical to test them with a subset of your audience. (You will probably want to revisit your messages once you've reviewed the social strategies and developed what you're actually going to do. There will more about strategy development in Chapters 7 and 8.) This will help ensure that your assumptions about techniques, media, materials, and messages are appropriate. In the testing phase, ask for the audiences' reactions. After they have provided feedback, be honest with them about what you're doing and what you hope to achieve.

When testing the messaging you've developed (based on your audience research), be clear with respondents that you're interested in how the communication is and isn't working—and that you want to know if and how it can work better. The discussion should be less about likes or dislikes and more about what feelings are elicited by messages and how people are being affected (although if people have extreme reactions, you will need to take those into consideration).

During the testing phase, you might want to explore these topics, among others, with your audiences:

- What is the main message?
- Is it relevant to the audience?
- Is it compelling for the audience? Is it unique to them?
- What feelings does it evoke in your audience?
  How does it make them feel about getting involved?
- What's the tone of the communication?
- Does it alter your audience's opinion of the cause
  or organization?

Testing with the Audience in Mind

- If you have many messages that are part of a larger campaign, be sure to gauge reactions to individual messages as well as to the entire campaign.

- Be sensitive to how much people can assimilate and respond to in one session. Don't overload them.

- Ask respondents to write down their reactions *before* any discussion to ensure they stick to their opinion and aren't swayed by someone else.

- When you're testing multiple concepts, rotate the order in which you present concepts to your audiences as the presentation order may influence how they are received.

- Let respondents receive your concepts as they will ultimately be delivered. For example, if it's a print idea, let them see it and read it; if it's a radio script, let them hear it.

Messaging Tip Sheet: Create Compelling Messages

Effective messaging is about narrowing the focus and making a few strong points that people will remember, rather than throwing out a variety of points and letting the audience decide which of these it wants to retain. Answering a few simple questions will help you consider what you want to say. The following examples, from the work of Spitfire Strategies, illustrate how these tips can help you think through messaging.

Question One: Who are you trying to reach with your message?

The audience should be as narrowly targeted as possible. Your audience should never be the "general public"—it's simply too big and diverse to reach everyone with a single message. Instead, narrow your aim to a specific target that relates to your goal.

Example: An environmental group is trying to reduce the amount of air pollutants emitted by cars by increasing the number of children who walk or bike to school in the community. Potential audiences for its messages could include parents, principals, or health education teachers. The audiences could be narrowed even further by selecting moms of students at three elementary schools, for example. The narrower you are with your audience choices, the more your message will resonate with those audiences.

Question Two: What does your audience care about?

Messages that take into account the values and core concerns of the target audience are most effective. By tapping into your audience's existing values, you can create common ground and more easily motivate them to act. These can be "big" values like fairness but they can also be "smaller" core concerns of a mother or father wanting to keep her or his family safe or a business owner wanting to make a profit.

Before you begin developing message points, take the time to think carefully about what your audience cares about. Recognize that the values of your audience may be different than those of your organization. For each audience, brainstorm a list of values, and then select the one that seems to be most important to that audience. You can review public opinion studies or informally talk to members of your target audience for insight.

It's important to be sure that your message taps into one existing value that your audience has rather than the value that you want them to have.

The most important thing in communication is to hear what isn't being said.
—Unknown

Example: An environmental group wants to stop a proposed airport expansion because the construction of new runways would destroy the habitat of a certain species of frog. To do this, the group needs to activate members of the community to tell local government officials to stop the expansion. The group talked with members of the community about their concerns. They found out that community members were very worried about increased traffic, but far less concerned about environmental impact. The group decided to focus their messages on how the airport expansion would increase traffic (their audience's core concern), rather than its impact on biodiversity (the environmental group's core concern). Aligning the messaging with the audience's values increased the chances of reaching a desired outcome—for people as well as frogs.

Developing Message Points

Once you know who you want to reach and have considered what they care about, you can create message points that will resonate with this audience. Good messaging has no more than four main points, which should be concise and compelling. It is that easy—and that hard.
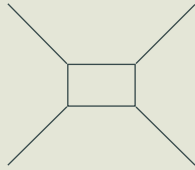
To help you think through your message points, try using a message box. The circular nature of the message box reminds you that you can start at any message point and hop around box any time you're communicating about your issue—whether in a speech, during an interview, or in a press release. Just stay in the message box.

If the messages were presented in a linear fashion, the inclination would be to start at the top and work down. Instead, messages should remain flexible so you can deliver the ones that best fit an audience's knowledge and interest.

For each target audience that you are trying to reach, you should have a different message box. This is because each audience is likely to have different values, and your messages will be most effective if they're tailored to each of your target audiences. Tailoring your messages doesn't mean starting from scratch, but rather adjusting each of the points as needed for the new audience.

Once you have filled in the four core messages in your box (described below), you can develop supporting points for each message including compelling facts, stories, and statistics. Here's an example from the Joint Oceans Committee Initiative (JOCI).

Mission of the Joint Ocean Commission Initiative (JOCI)

The JOCI works with all sectors of the ocean community to encourage action and monitor progress toward meaningful ocean policy reform. The Joint Initiative works with people and organizations at the national, regional, state, and local levels to build durable support for ocean policy reform at all levels of decision making. Through its work the Joint Initiative seeks to expand our collective understanding of the threats facing our oceans and to enable actions that address them so that our oceans remain vibrant and healthy for current and future generations.

The Value Message: Top (North) Section
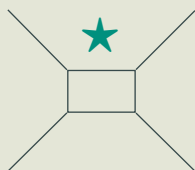
This is where you connect with your audience and tap into a specific value that your audience has. This message point reminds them of your common ground, or says something that will get them to agree or at least nod their heads. For newcomer audiences this is a point where you may spend a great deal of time while making a speech or preparing materials. For the choir, this is more of a touch-and-move-on point. Remind them quickly and move to other points that are more pressing.

Example: The Joint Oceans Committee Initiative (JOCI) provides a good example of a successful value message. JOCI's objective was to recruit members of congress to act as champions—"leaders showing the way"—who would support current and future ocean conservation goals. JOCI identified members of Congress who were supportive of environmental issues and tapped into their value with the message: *Throughout your career you have remained committed to passing on a clean, healthy environment to our children.*
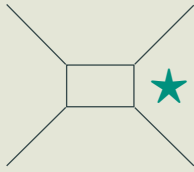
The Barrier Message: Right (East) Section

Effectively countering misconceptions is a challenge. With so many different ideas out there, the chance for misconception is high. People may not realize the extent of a problem or that they're basing their decisions on an incorrect fact.

Think about all the seemingly credible stories you have heard that have ended up being urban legends. Many people passed around false information before the story made its way to you and countless others. It doesn't take long to circulate an incorrect fact as the truth. The barrier message point addresses this challenge by countering your audience's key misconception about your issue.

The key to a successful barrier message is that you *do not repeat your audience's misconception.* Rather, you provide new or unexpected information to overcome this barrier to your audience buying in to your message.

Example: JOCI discovered that oceans were not a top environmental priority for many of the legislators they were targeting. One of the key misperceptions was that this bill would not make a significant difference in environmental health. Another—and possibly a bigger—misperception was that the effects would not be seen for a long time. Therefore, the barrier message focused on the significance of the efforts and the potential for quick results: *Ours is a clear solution with the potential for immediate impact to reverse environmental damage.*

The Ask: Bottom (South) Section
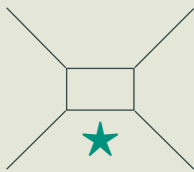
At least one message point should be focused on getting the target audience to do something. What's the point in getting their attention if you don't use it to reach your goals? This is where the "ask" comes in—the more doable it is the better. Asking someone to save the children isn't helpful, it's overwhelming. People have no idea how to do this. Increasing a school budget to allow for more qualified teachers, however, is something people can get behind.

Example: If JOCI had simply said, *save the oceans,* it's doubtful they would have been successful in their recruitment efforts. Saving the oceans is a big, intimidating challenge. Instead, they gave legislators a doable ask: *Become a leader for ocean policy by joining the Oceans Caucus.*

The Vision Message: Left (West) Section
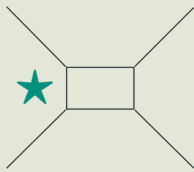
This message point echoes the value message point. It says to people: If you do what I ask, then you will get what you want.

Example: JOCI delivered the vision message: *Your leadership in helping to preserve this vast resource will go a long way toward protecting and improving the planet's health.* The message echoed the value message and reminded legislators of their support for a healthy environment for themselves and their children.

Testing Your Message Box

Once you have finished your message box, test your messages among some members of your target audience. This could be as simple as asking three or four members of your audience what they think, or it may mean fielding a national poll. Either way, try it out on someone who can evaluate the messages from a neutral standpoint. (This rules out you and anyone who helped you complete your message box.)

For a worksheet on creating compelling messages, see **Tool #21** on page 154 in **Section E.**

Mountain gorilla   Gerry Ellis

Mapping Out Your Audience

Based on what you have learned about your audience, you are now ready to map what you know about them. This exercise will assist in later developing the social strategy that's best for communicating with them and influencing their behaviors. (For more about engagement strategies, see Chapter 7.)

To successfully engage people, planners need to know their target audience's comfort zone. When possible, organizations should find a way to frame their "ask" in a way that stays within that comfort zone.

If organizations want to move people from their comfort zones, they need to find ways to make the risks worth the benefits. If organizations want to expand a person's comfort zone, consider an audience's lifestyle as well as life events that might make this possible.

Spitfire Strategies' *Discovering the Activation Point* (activationpoint.org/) provides a more detailed discussion about where audiences fall on the spectrum of needing more information, encouragement to act, or reinforcement for current actions.

➡ See **Tool #22** on page 156 for an exercise that will help you think through your audiences, strategies, messengers, and messages,

You may also want to review **Tools #13–#17** (pages 139–145 in **Section E**) on selecting and understanding your audience.

The Bottom Line

Messages matter. This chapter highlighted tips about message development, as well as how to develop a message box.

Ask yourself the following questions:

- Who are you trying to reach with your messages?

- What do they care about?

- What values do they have?

- For each audience, have you developed a message box to help you think through your values message, barrier message, ask, and vision message?

- Did you test your messages with your target audiences?

Words, when well chosen, have so great a force in them that a description often gives us more lively ideas than the sight of things themselves.
—Joseph Addison

Most wonderful of all are words, and how they make friends one with another.
—O. Henry

Great bowerbird
Gerry Ellis

Red stink bug
Gerry Ellis

We all have the potential to move the world, and the world is ready to be moved.
—Harry Chapin

Section D. What Are You Going To Do?

Step 16 Select Your Social Strategies

....

Step 17 Brainstorm and Prioritize Your Strategies

....

Step 18 Describe Your Theory of Change

....

Step 19 Use Your Logic Models to Develop Your Evaluation Strategy

....

Step 20 Complete a Plan of Action, Kaizen Style!

We cannot win this battle to save species and environments without forging an emotional bond between ourselves and nature as well—for we will not fight to save what we do not love.
—Stephen Jay Gould

Exploring the Social Strategies

The best way to have a good idea is to have lots of ideas.
—Linus Pauling

Once you've gathered and analyzed your data, you should have a much clearer picture of your audience, including how much they know about your target issue, and how willing they are to act. You will need to design your program strategies to be consistent with those characteristics. You can choose from a number of strategies such as education, social marketing, general communications, advocacy, civic engagement, and outreach. Although there is overlap among all of them, each will have its own strengths and might have an appropriate application for a given program. This section highlights some of the factors to consider as you're developing the strategies that will be most effective in influencing your target audiences and helping achieve your goals.

Adelie penguins   Gerry Ellis

When you create you get a little endorphin rush. Why do you think Einstein looked like that?
—Robin Williams

Select Your Social Strategies

Not everyone can be Gandhi, but each of us has the power to make sure our own lives count—and it's those millions of lives that will ultimately build a better world.
—Jeffrey Skoll

Now that you've decided who you need to reach and what's important to them, the next question is how you will engage them. We define **social strategies** as the ways that conservation organizations and agencies involve people in conservation action and promote learning.

There are a number of strategies to consider in your planning, and each is defined in a way that emphasizes certain characteristics and outcomes. These characteristics and outcomes differentiate education strategies from communication, advocacy, outreach, or social marketing strategies. This toolkit attempts to address some of the similarities and differences among these methods, and you'll notice that we use these terms in specific ways. (See the glossary in Section F.) However, the definitions aren't as important as knowing what you're trying to do and implementing the appropriate tools and research-based approaches that will help get you where you want to go.

All of these strategies can lead to changes in behavior and help achieve conservation and human welfare goals. However, each has certain benefits that might make them more or less appropriate for your particular circumstance. Many are complementary and all are backed by research regarding how people learn, become engaged, overcome barriers, and respond to messages.

Gerry Ellis

A continuum of approaches is needed, ranging from information/education (show me), through social marketing approaches (help me) to regulations and legal interventions (make me).
—Jay Kassirer

Social Marketing

Social marketing is defined as a communication and education strategy that focuses on the process of influencing human behavior on a large scale, using marketing principles for the purposes of societal benefit rather than commercial profit.

Proyecto Tití is one example of a conservation project that has used social marketing as an important component of a multi-pronged effort:

Cotton-top tamarin

• The cotton-top tamarin is a critically endangered species endemic to the forests of northwestern Colombia. Cotton-top tamarins have been affected dramatically by the activities of the villagers who live in and near their habitat. Many things contribute to this situation: the common use of cook stoves that require high quantities of wood, limited access to employment opportunities, the market for illegally traded pets, the villagers' lack of awareness of the importance of the tamarins to the local ecosystem, and the lack of knowledge of the long-term impact of continued unsustainable use of forest products.

• To raise awareness about tamarins and create interest in the conservation program, Proyecto Tití distributed T-shirts and posters depicting the animal in its natural habitat. Given residents' eagerness to decorate the walls of their homes, the colorful posters were particularly popular.

• To address the illegal pet trade, Proyecto Tití borrowed an idea from U.S. gun exchange programs and set up a slingshot exchange. Villagers were encouraged to trade their slingshots for locally made stuffed tamarins. The plush toys were prized by village youth, and the program was remarkably successful.

• In post-project interviews with heads of 76 village households, 100 percent reported that they had ceased hunting of the tamarins since Proyecto Tití was initiated in their village. This increased awareness resulted in a number of individuals bringing their pet tamarins to the zoo as a donation.

See the link to the Case Study Collection on page 207 in Section F for a full description of this project and additional examples of social marketing strategies. The site also provides more details on what a social marketing campaign is, how it can help lead to specific actions, and how it can be used to achieve change, in conjunction with education and other strategies. There are also many excellent resources that focus on how to best develop a social marketing campaign.

Environmental Education

A complementary strategy that is designed to increase people's environmental literacy and move people to take action is called **environmental education**. In contrast to a social marketing approach, environmental education is based on theories of learning for young people and adults (pedagogy and andragogy). It aims to help people move through an **experiential learning cycle** that includes building awareness and knowledge, developing skills, influencing attitudes, and promoting action to help the environment and society.

Environmental education is usually not associated with one specific behavior, but instead reflects people's knowledge, attitudes, and values, and their general tendency to behave in ways that support the environment. However, some environmental education programs are designed to do both—they might focus on a specific behavior, such as water conservation, while also educating people about why water is a precious resource, how our efforts at conservation can add up to a larger impact, and how people can be more thoughtful in their use of natural resources, too.

Research designed to understand how this kind of approach affects behavior can be challenging because it can be difficult to identify specific behaviors to study and define the time frame in which to study them. Although environmental education can lead to immediate actions, such as restoring habitat and recycling, it can also focus on long-term learning and skill building.

Environmental education is defined as "[a process] to develop a world population that is aware of, and concerned about, the environment and its associated problems, and which has the knowledge, skills, attitudes, motivations, and commitment to work individually and collectively toward solutions of current problems and the prevention of new ones" (UNESCO-UNEP, 1976). Environmental education takes place in formal settings (such as schools, universities, community colleges) and informal settings (such as zoos, museums, parks, and online).

Although some people think that environmental education is mostly directed at children and educators, the reality is most learning occurs outside the formal school system. According to John Falk, a professor of free-choice learning at Oregon State University, we spend only about 5 percent of our lives in formal school settings—the rest of our learning takes place in parks, zoos, museums, theaters, lecture halls, faith-based organizations, work settings, camps, and other community-based institutions. Environmental education programming is designed to help people of all ages become more **environmentally literate.** The following examples illustrate how environmental education initiatives are designed to enhance environmental literacy and achieve concrete conservation goals.

CASE STUDY

In Columbus, Ohio, the Grange Insurance Audubon Center created a plan to improve a waterfront area that had been designated as an Important Bird Area.

They partnered with a charter school serving students returning to high school for the second time. After training, the students set up quadrats and used GPS to locate every invasive plant on the two-acre site. Later, the students continued to monitor the growth of each newly planted native and the return of invasives, such as honeysuckle. The students gained leadership experience, workforce skills, and hands-on science education while the data they collected enabled assessment of the project's progress in controlling invasive plants. (See the Case Study Collection on page 207 in **Section F**.)

What's an Important Bird Area (IBA)?
Important Bird Areas, or IBAs, are sites that provide essential habitat for one or more species of bird. IBAs include sites for breeding, wintering, and/or migrating birds. IBAs may be a few acres or thousands of acres, but usually they are discrete sites that stand out from the surrounding landscape. IBAs may include public or private lands, or both, and they may be protected or unprotected. Audubon has identified more than 2,000 IBAs in North America.

CASE STUDY

Along the Pacific Coast, threatened snowy plover populations were in steady decline.

Existing signage at Coal Oil Point Reserve in Santa Barbara, California did little to prevent nest disruption, and predation from crows and skunks was on the rise. The Reserve erected symbolic fencing and combined it with a public education program to help beach visitors observe the plovers and understand why the area was closed. Results have shown a steady increase in the number of breeding birds, now holding steady at a carrying capacity between 20 and 30 pairs.

The U.S. Fish and Wildlife Service western snowy plover recovery coordinator now considers education an essential component of plover and other shorebird recovery efforts throughout the region.

Snowy plover

Education for Sustainability

Many organizations use education for sustainability interchangeably with environmental education and some prefer one term or the other. Our view is that environmental education and education for sustainability are similar. Both are designed to explore the pathways to sustainability—meeting the needs of the present without compromising our ability to meet the needs of the future. In the process of understanding what sustainability means, education helps us examine the relationships between ecological integrity, economic prosperity, and social equity. These three goals can come into conflict, but education can help people learn how to negotiate, listen, compromise, persuade, facilitate, and analyze.

Thinking in terms of sustainability—and finding ways to balance economic issues, social equity, and ecological integrity—also requires thinking beyond our immediate needs and interests. Education engages learners to consider the perspectives of other individuals, communities, and cultures, and to look forward to assess the way actions today will affect the lives of people and other species in the future. Education also challenges people's thinking about fairness, individual and community responsibility, and other concerns that are critical to our understanding of sustainability.

Economic Prosperity   Social Equity

Ecological Integrity

One View of Sustainability
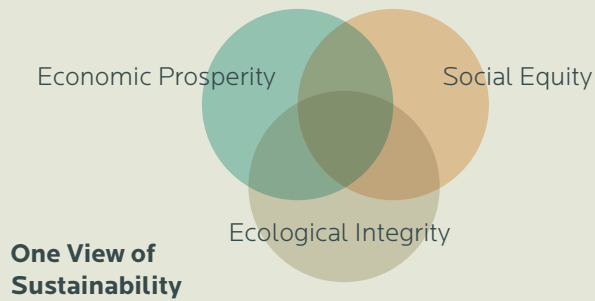
Sustainable development meets the needs of the present without compromising the ability of future generations to meet their own needs. Choosing to be sustainable in businesses, schools, government institutions, and in our individual lives demands a national commitment to the nation's economic prosperity, ecological integrity, and social equity.
—President's Council on Sustainable Development, 1995

Key Standards for Education for Sustainability

There are many organizations around the world working to enhance environmental education and education for sustainability. For example, the Cloud Institute works with educators and their communities to prepare learners for the shift toward a sustainable future, following these key standards:

• **Cultural Preservation and Transformation:** The preservation of cultural histories and heritages, and the transformation of cultural identities and practices that contribute to sustainable communities. Learners will develop the ability to discern with others what to preserve and what to change for future generations to thrive.

• **Responsible Local/Global Citizenship:** The rights, responsibilities, and actions associated with leadership and participation toward healthy and sustainable communities. Learners will know and understand these rights and responsibilities and assume their roles of leadership and participation.

• **The Dynamics of Systems & Change:** A system is made up of two or more parts in a dynamic relationship that forms a whole whose elements "hang together" and changes because they continually affect each other over time. Fundamental patterns of systems include growth, decline, and vacillation. Learners will know and understand the dynamic nature of complex systems and change over time. They will be able to apply the tools and concepts of system dynamics and systems thinking in their present lives, and to inform the choices that will affect our future.

• **Sustainable Economics:** The evolving theories and practices of economics and the shift towards integrating our economic, natural, and social systems to support and maintain life on the planet. Learners will know and understand 21st century economic practices and will produce and consume in ways that contribute to the health of the financial, social, and natural capital.

• **Healthy Commons:** Healthy Commons are that upon which we all depend and for which we are all responsible (i.e., air, trust, our collective future, water, libraries, public health, heritage sites, top soil, etc.). Learners will be able to recognize and value the vital importance of the Commons in our lives and for our future. They will assume the rights, responsibilities, and actions to care for the Commons.

• **Natural Laws and Ecological Principles:** The laws of nature and science principles of sustainability. Learners will see themselves as interdependent with each other, all living things, and natural systems. They will be able to put their knowledge and understanding to use in the service of their lives, their communities, and the places in which they live.

• **Inventing and Affecting the Future:** The vital role of vision, imagination, and intention in creating the desired future. Learners will design, implement, and assess actions in the service of their vision.

• **Multiple Perspectives:** The perspectives, life experiences, and cultures of others, as well as our own. Learners will know, understand, value, and draw from multiple perspectives to co-create with diverse stakeholders shared and evolving visions and actions in the service of a healthy and sustainable future.

• **A Sense of Place:** The strong connection to the place in which one lives. Learners will recognize and value the interrelationships between the social, economic, ecological, and architectural history of that place and contribute to its continuous health.

For more about the Cloud Institute, see cloudinstitute.org, and for more about environmental education, see NAAEE.org and the resources in the appendices.

Between 1978 and 2000, the nonprofit Quebec-Labrador Foundation and the Canadian Wildlife Service ran a multi-pronged educational campaign to restore the depleted seabird population, while preserving the local culture, with its long tradition of seabird hunting, even after regulations to protect the colonies made it illegal.

All age groups were targeted, but hands-on instruction for young people and a program to hire teenagers for jobs as field researchers were especially effective, along with helping to enforce existing policies and promoting alternative behaviors. Polling shows that these young people grew into more conservation-minded adults; excessive harvesting of seabirds is no longer a problem, and the community is proud of its seabird colonies, which attract ecotourism. And during the multi-year assessment, threatened seabird populations increased dramatically. To get access to all the case studies mentioned in this section, see the Case Study Collection in **Section F** on page 207.

Atlantic puffin

➡ For more information on environmental education, see **Tool #24** on page 160 in **Section E.**

Other Strategies

This section provides an overview of additional strategies that make up the tools in the toolkit. Note how the strategies overlap and that some examples fit into more than category.

Strategic Communications:

Strategic communications activities apply the tools of communication, education, and public outreach with the intention of disseminating the right messages—through the right media, to the right audience, at the right time. Strategic communications include two-way communication and dialogue, messaging and positioning, campaigns, media relationship, writing and materials development, and other strategies to achieve social change objectives. (For more information on strategic communications, see spitfirestrategies.com.)

Strategic communications efforts can help achieve conservation goals, as demonstrated in the following example:

When the Belize Audubon Society sought to protect the Crooked Tree Wildlife Sanctuary from hunting, fishing, grazing, and farming inside its boundaries, the nonprofit organization needed to balance conservation interests with the concerns of villagers who were financially dependent on the resources. Two-way communication that emphasized cost-savings and alternative sources of income for the farmers was essential for developing more sustainable practices.

Based on early input from the target audience, the campaign carefully tailored its message to make people less defensive. The words of a pop song developed as a marketing tool for the project were changed from "Don't chop down the trees" to the more sensitive, "Be careful how you chop down the trees."

Choosing the right messengers was also critical. When a study showed that 90 percent of residents trusted teachers, the campaign trained teachers about wetlands protection and these respected messengers shared the information with parents. (See the Case Study Collection on page 207 in **Section F**.)

Capacity Building:

Capacity building is a process that focuses on how to strengthen organizations and the staff capacity of organizations and partners, including infrastructure, operational effectiveness, individual skill building, and leadership development.

Gerry Ellis

For example, Diversity Matters works to diversify the racial and ethnic composition of the U.S. environmental movement by developing leaders, diversifying institutions, and building community. Although conservation is the ultimate goal, their efforts focus on diversifying the movement and linking a healthy environment with social equity and community building.

As part of their work, Diversity Matters conducts institutional assessments and helps provide strategic direction for diversifying an environmental organization. By building the capacity of organizations to become more diverse and inclusive, they are strengthening the movement, which will ultimately create more environmentally literate citizens who are more likely to take action to protect the environment.

Advocacy:

Advocacy efforts encourage people to speak out on issues of concern or to support a cause or proposal. An organization may have advocacy as all or part of its mission with the goal of increasing public awareness of a particular issue or set of issues. They may also strive to encourage political action.

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CASE STUDIES

The Beach Vitex Task Force successfully urged the North Carolina Department of Agriculture to list beach vitex as a noxious weed, making it illegal to plant and requiring containment or elimination of existing plants.

George Ramirez, a community leader from Manzano, New Mexico, testified before Congress about a 10,000-acre watershed adjacent to the Cibola National Forest that faced risk of catastrophic fire and endangered water resources. As a result of this advocacy, his nonprofit organization received federal funding to train students and workers in forest thinning, data-collection, and business administration.

After seeing numerous purple martins hit by cars, members of the Coastal Carolina Purple Martin Society persuaded county commissioners in Dare County, North Carolina, to lower the speed limit at the birds' peak movement hours. Then they convinced the State Department of Transportation to install signs with flashing lights to warn motorists of the decreased speed limit.

(For more about all the case studies, see the **Case Study Collection** on page 207 in **Section F**.)

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For more information on advocacy, see **Tool #25** on page 162 in **Section E.**

Crooked Tree Wildlife Sanctuary

Community outreach:

Community outreach refers to education and communication strategies designed to engage key stakeholders (including individuals, groups, and agencies) that are important to the success of a conservation initiative. The section on planning discusses initial ways to engage stakeholders (see Chapter 1), but you'll need to continue to involve coalition partners at every stage of the initiative. The following examples describe community outreach efforts that focus on long-term involvement of stakeholders.

To develop her campaign to protect the Crooked Tree Wildlife Sanctuary from the effects of slash and burn farming, overgrazing, over fishing, and encroachment, Olivia Carballo-Avile, who worked with Belize Audubon and Rare Conservation, met with numerous stakeholders, including farmers, fish harvesters, school children, and local tourism industry representatives, to identify threats to the sanctuary. The conflicts over competing needs for the resource made this a politically challenging context for conservation efforts. And while the process was sometimes contentious, involving all stakeholders from the beginning made the campaign far more conciliatory overall. Investing the time and effort required to work with the many parties with a stake in the project outcome makes sustained success far more likely.

The Beach Vitex Task Force organized a symposium to bring together state and federal agencies, nongovernmental organizations, universities, and conservation groups. The convening of the stakeholders and the dividing of tasks throughout the life of the campaign was essential for eradicating beach vitex in South Carolina.

It's important to note that initial opponents or those uncomfortable with change are also stakeholders. Because of their resistance or misgivings, which could effect the efficacy of your campaign, your work with them may be the most important.

The Pemba flying fox, a bat that lives only on an island off the coast of Tanzania, was near extinction, in part because it was considered a traditional delicacy. Among many educational activities, Fauna & Flora International recruited students as "bat ambassadors" and formed village "bat clubs" to protect roosts. Today, islanders take pride in the flying fox and have been trained as tour guides for ecotourists. This also shows how social marketing can be combined with community outreach.

(For more about all the case studies, see the **Case Study Collection** on page 207 in **Section F**.)

Combos Work Best

Because of the complexities of most environmental problems, many conservation efforts combine different types of social strategies. Throughout the planning process, it's helpful to think less about individual strategies and more about the continuum of strategies that can help achieve conservation goals. That is, you will probably mix and match outreach strategies for different audiences. You may reach elected officials with an advocacy strategy while running a social marketing campaign to change individual behavior.

For example, when the Coastal Carolina Purple Martin Society wanted to reduce purple martin deaths due to collisions with cars on a bridge to the Outer Banks of North Carolina, they used different tools for different purposes. They first thought a fence would save the birds and advocated with the U.S. Fish and Wildlife Service and the North Carolina Department of Transportation to fund and install fencing.

After monitoring the drivers on the bridge and collecting data on when the birds were most often hit, they revised their plan. They decided to focus on reducing the drivers' speed by posting signs and educating them about the dangers to the martins. Advocacy with elected officials was still important: The County Commissioners agreed to lower the speed limit at dusk and dawn when most martins were being hit.

The Coastal Carolina Purple Martin Society used a range of strategies to reduce martin deaths to a fraction of what they once were. Members spoke at festivals, encouraged media coverage, held educational programs at the foot of the bridge, and offered boat trips to see the birds from the water.

In the end, not only the birds, but the entire community benefited. The town responded to increased interest in the martins' roosts by making the bridge a destination point for tourists and bird watchers. There is now a parking area, a boardwalk to the marsh, a fishing pier with handicapped access, a kayak launch, a martin house, and new plantings. The nightly martin watch is the pride of the community. (See the Case Study Collection on page 207 in **Section F**.)

Environmental Justice for All

The Environmental Justice movement is an active effort to make sure people of all races, ethnicities, cultures, and incomes have equal opportunities to live and work in a healthy environment. By encouraging people to examine issues from all sides and to develop an ethical framework for making decisions and taking action, educational programming can help learners of all ages and background understand the role that social equity plays in creating a more sustainable world. (For more information, contact EPA's Office of Environmental Justice epa.gov/environmentaljustice)

For information on matching your problems with the most effective social strategy, see **Tool #26** on page 164 in **Section E.**

Social media, such as Facebook, Twitter, and Flickr, can support all social strategies. For a cheat sheet on social media, see **Tool #27** on page 166 in **Section E**.

Value of Education to Organizations

Many education and outreach specialists work for conservation and environmental organizations and agencies such as the National Audubon Society, the American Forest Foundation, the U.S. Fish and Wildlife Service, and the U.S. Environmental Protection Agency. Why is education so valuable to these organizations and agencies? In addition to directly helping achieve conservation goals, there are many other benefits to integrating education and outreach strategies into conservation efforts.

- Education is a connector issue. It's hard to find a parent or grandparent who doesn't care about the education of their children and want a better future for them.

- Education programs can generate conservation-related funding that would not be available to an organization or agency without an educational mission. Many foundations, corporations, individuals, and government agencies understand the power of education and the impact it can have on individuals, organizations, and communities.

- An education project can open doors in a community and build trust, which can then lead to more challenging actions, including policy work.

- In conjunction with other social strategies, education can help your audiences understand an issue and why it matters. Education can also make issues relevant to individuals and communities and help people understand their connection to an issue.

- Education programs focusing on young people can encourage a long-term view of environmental sustainability. Research suggests that education programs that help kids develop environmentally friendly values and attitudes can have a lifelong impact on how they view the world and environment.

These benefits reinforce the critical role education can play as a strategy to help achieve conservation results in the short term and the long term.

What Is Experiential Learning?

Research suggests that children and adults alike learn better when they are actively engaged and have a chance to take part in varied experiences. Experiential learning relies on a cycle where participants:

- Take part in some type of experience (such as a workshop, debate, case study, activity, or hike)
- Process what they did
- Have the chance to reflect on and generalize about what they learned and what insights they gained that could apply to other situations
- Apply and practice the skills in a different setting or with regard to a new issue

There are several experiential learning models, but as you plan a workshop, conference, program, or other educational effort, experiential learning can significantly increase the educational outcomes.

Apply — Experience — Process — Generalize

Our species needs, and deserves, a citizenry with minds wide awake and a basic understanding of how the world works.
—Carl Sagan

Commonly Used Outreach Tools and Tactics

Mass Media

- Press kits, tip sheets, and fact sheets
- Press conferences
- Public service announcements (PSAs)
- News releases
- Interviews
- Advertisements
- Earned media
- Letters to the editor
- Social media, including web sites, listservs, email, blogs, Facebook, and Twitter
- Campaigns
- Op-Eds

Education/Interpretive Media

- Exhibits
- Kiosks
- Traveling trunks
- Curricula
- Publications
- Media (see above)
- Theater
- Direct mail
- Programs on specific topics for the public
- Social media (linked to mass media)
- Distance learning
- Environmental clubs
- Interpretive hikes

Events (education, communication)

- Public presentations
- Workshops and forums
- Special events, open houses, tours, field trips
- Awards and recognition
- Meetings with elected officials
- Contests and prizes
- Demonstration areas

Types of Educational Programming

- Storytelling
- Hands-on activities
- Games
- Case studies (as learning activities)
- Role-playing
- Art activities (linked to conservation)
- Citizen science activities
- Journaling
- Service learning
- Issue investigation

Other

- Social marketing campaigns (which use social media, education, and other tools)
- Advocacy campaigns (which use many of the above tools)
- Posters, brochures, and flyers
- Reports
- Survey results with media interest

Source: U.S. Fish and Wildlife Service, Audubon

Earned media (or **free media**) refers to favorable publicity gained through promotional efforts other than advertising, as opposed to paid media, which refers to publicity gained through advertising.

What The Research Says

As you're thinking about which strategies make sense for your project, review what the research says about what we know influences behavior and how to encourage conservation action. The following are the top ten tips we found from our search of the literature.

For more detail, please see "Influencing Conservation Action: What the Research Says About Environmental Literacy, Behavior, and Conservation." In that section, we dug into the research to address some of the most common questions we've received from conservation practitioners about how to use education, social marketing, advocacy, and other strategies to best engage people in conservation. (See page 206 in **Section F**.)

1. Changing people's behavior isn't easy.

In general, people prefer *not* to change. Overcoming this tendency often requires changing what people know, how they feel, what they care about, their priorities, their skills, their motivations, and a host of other factors. It also requires addressing barriers to action and making specific recommendations for how to overcome those. Researchers studying human behavior remind us that there's not a simple formula for moving people to action. Each situation, target audience, and issue may require a slightly different and tailored approach.

2. Know your audience.

Encouraging new behaviors requires that you know what makes your audience tick. You need to know what they know, how they feel, who they trust, what motivates them, and what barriers they find to be the most daunting. The better you know your audience, the more effectively you can engage them through education and outreach, communications, advocacy, and social marketing. Conservation is about working to achieve immediate goals and shift societal values to those that support biodiversity protection, equity, and healthier, more sustainable communities. It's impossible to do that without understanding the audiences you hope to influence.

3. Knowledge is the gateway to action.

People need to know and care about an issue before they act on it. Although information alone rarely moves people to action, informational materials that are accurate, compelling, and provide specific guidance can lay the groundwork and enhance motivation.

4. Communications must be aligned with the audience's existing values and attitudes, while also encouraging the adoption of values and attitudes that support the changed behavior. Environmental materials sometimes talk about "saving the planet" and "making the world a better place." These broad messages can sound good, but they ignore the fact that many people are focused on what's in it for them. People are unlikely to change their actions if they don't see the relevance to their own lives. Audiences that value individualism may need to see that conservation does not impede individual choice or business interests.

5. Make action easy.

Conservation practitioners should make actions as easy as possible, remove the barriers to action, offer alternative behaviors, and make people feel good after taking the action. If people find taking action easy and effective, they will be more likely to take action in the future.

6. Environmental literacy increases knowledge, changes attitudes, and develops skills for taking action.

Although more rigorous research is needed on the link between environmental literacy and action, the limited research to date suggests that environmental literacy plays a vital role in helping people make informed environmental decisions.

Elephant

7. Seeing is believing.

People are more likely to adopt a behavior if they see other people, especially people they trust, taking the action. The more the changed behavior looks like the social norm or that "everyone's doing it," the more likely it will be that individuals conform to the new behavior and become part of the group. And the less people know or care about a subject, the more important it is that they hear from someone they trust or a person who is like them.

8. Incentives can be a powerful tool to encourage people to adopt a new behavior and

they may be useful for actions that are not easy to adopt. However, you need to use incentives cautiously: When the incentive is no longer available, many people will discontinue the new behavior. Other social strategies, such as education and recognition, can be coupled with incentives to support a change over time.

9. Keep it simple.

Giving people a long list of options can be overwhelming; it's called "choice overload." Instead of multiple choices, give people one or two options. Or, when appropriate, consider a strategy that eliminates the need to make a choice.

10. Multiple approaches can yield strong results.

Sometimes efforts are more successful when they use multiple approaches to encourage steward-ship behavior. In some cases, one intervention is all that's needed. But at other times, campaigns can be more effective when they use a variety of approaches. For example, evaluation of the Quebec Labrador Foundation's seabird restoration project, which was implemented over the course of more than a decade, found that the combination of education, outreach, enforcement, and communication ultimately achieved success and increased populations of threatened seabirds.

Everyone is entitled to their own opinions.
No one is entitled to their own facts.
—Daniel Patrick Moynihan

The vast possibilities of our great future will become realities
only if we make ourselves responsible for that future.
—Gifford Pinchot

The Bottom Line

As you think about the strategies you will use to achieve your goals, consider the range of options and what will help achieve your ultimate goals.

Ask yourself the following questions:

- Are you trying to get people to do a specific, concrete action? Consider social marketing.

- Are you trying to influence values and attitudes? Consider education and communication.

- Is lack of knowledge a problem? Consider education and communication.

- Do you need to change policies and laws? Does enforcement need to be enhanced? Consider advocacy and social marketing.

- Have you reviewed the research about what works in different situations?

- Have you considered multiple strategies to achieve your goals?

8

Moving From Planning to Action

Even if you're on the right track, you'll get run over if you just sit there.
—Will Rogers

The first seven chapters in this toolkit focused on thinking about what you're trying to accomplish, who you're trying to reach, what you want them to do, what social strategies might work best, and what messages will resonate. Now you need to put all of this thinking into a cohesive action plan, with a strategy for how you will measure success. In this chapter, we will focus on the following:

- Brainstorming your **strategies** (what are you actually going to do?)

- Describing your **theory of change** (how your strategies will lead to your objectives and goals)

- Determining your **evaluation strategy**

- Creating an **action plan** and a **monitoring plan** so you can get the work done and make sure everything is on track

To get started, you need to go back as a team and look at your targets and the goals you developed at the beginning of your planning process. These goals should outline the future condition of your targets—both your biodiversity targets and your human welfare targets. Are the goals still the same, after additional thinking and exploring? Do they outline how your targets will change if your work is successful? Are they measurable, time limited, and specific enough so that everyone on the team knows what you're shooting for? (See page 27 for more about goals.)

The final step of developing a plan involves developing the overarching strategies for how you will achieve your goals and what activities will support your efforts. As part of the action planning process, you need to lay out your theory of change (how you believe your intended activities will help you reach your goals) and create an evaluation plan that defines how you will measure progress as you go, as well as your ultimate success.

Marmot

Note: It's important to note that we're using the word **"strategies"** in two ways in this toolkit. In Chapter 7, we were talking about "social strategies," which are the broadly defined approaches that will help you achieve your goals, such as education, social marketing, advocacy, and outreach. In this chapter, we are using strategy in the context of action planning. So when we talk about your strategies, we're talking about what you're actually going to do to address the root causes and direct threats to your targets.

Brainstorm and Prioritize Your Strategies

One of the hardest parts of action planning is focusing on what you should and shouldn't do. As you were brainstorming your threats and root causes in Chapter 3, you probably outlined many more threats and root causes than you could possibly address. We recommended prioritizing to figure out which threats and root causes were most urgent and strategic. (There are many ways to prioritize. See the Open Standards for more about identifying high-rated threats; also see the activity on page 136 to help prioritize root causes and the audiences linked to those root causes.) You can also use the following strategic lenses to help determine where you can have the most impact, as you look back at your threats, root causes, and audiences. These types of lenses can help at various stages in the planning process.

Strategic Thinking Lenses

1. **Urgency Lens**—If not addressed soon, there could be adverse consequences.

2. **Building Block Lens**—Needs to be tackled before other priorities can be addressed.

3. **Advocacy Lens**—Would be welcomed by government partners and other key stakeholders, building goodwill to tap later for tougher challenges.

4. **Feasibility Lens**—There is a high probability that the current environment enables the team to implement and achieve agreed upon results.

5. **Commitment Lens**—There is enough strong commitment within the team to see it through to implementation and action.

6. **Impact Lens**—Can potentially achieve significant impact.

After you've reviewed your goals, targets, threats, root causes, and audiences, use these filters to identify your project's focus and, as a team, brainstorm strategies that can help address the problems. If you need help thinking about types of strategies, see the Taxonomy of Conservation Actions at conservationmeasures.org/initiatives/threats-actions-taxonomies/actions-taxonomy.

In brainstorming, think about audiences and stakeholder groups you need to reach (look back at your audience planning worksheets). Be sure to complete the brainstorming process before prioritizing audiences and stakeholders.

Once you have a list of strategies, work with your team to decide on a process for identifying the most effective and feasible strategies. You can do this as a group, making decisions based on your knowledge and understanding of your site, audiences, and project. You can also use a more deliberate ranking process. For example, Miradi has a rating process that helps define and rate potential impact and feasibility. See box on the following page.

Another option is to use the strategic lenses (see box above), adding lenses that make sense for your project and team. For example, you might want to consider whether anyone else is already working on this issue.

A strategy includes a collection of **activities** that will help accomplish your goals. For example, if your strategy is to educate the public and lawmakers about the health of a bay, your individual activities may include educational workshops to teach landowners how they can manage their land so that runoff does not pollute the watershed (and subsequently the bay), designing and disseminating brochures to raise awareness about disposing of motor oil properly, creating a public service announcement connecting individual actions to the bay's health, and hosting a rally on the state house lawn to call attention to a policy that is negatively affecting bay health.

Two Criteria for Rating Strategies from **The Open Standards Training Guide**

Potential Impact: Degree to which the strategy (if implemented) will lead to desired changes in the situation at your project site.

Feasibility: Degree to which your project team could implement the strategy within likely time, financial, staffing, ethical, and other constraints.

Hope has an edge. It's messy. It requires that we let go of all pat answers, all preconceived formulas, all confidence that our sailing will be smooth. It's not a resting point. Honest hope is a movement.
—Frances Moore Lappe and Anna Lappe

Sample Strategies:

To help protect a marine reserve:

- Strengthen the capacity of park guards to enforce boating regulations

- Conduct an awareness-raising campaign to educate companies and restaurants about the ecological effects of shark fin fishing

- Conduct a media campaign to reduce consumer consumption of shark fin soup in key Asian markets

- Educate fish harvesters about sustainable open-ocean fishing techniques

- Influence policy to limit immigration to the marine reserve site

- Lobby the shipping industry and government ministries to redirect international shipping routes within the reserve

- Promote oil spill mitigation techniques

Source: *Conceptualizing and Planning Conservation Projects and Programs: A Training Manual.* Based on the Conservation Measures Partnership's Open Standards for the Practice of Conservation; October 2008, Foundations of Success; FOSonline.org

Pelican and boat   Gerry Ellis

Green sea turtle

Describe Your Theory of Change

Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted.
—Albert Einstein

I know that half of my advertising dollars are wasted …
I just don't know which half.
—John Wanamaker

What's your theory of change?

Now that you have a list of your top strategies, you need to think about how each will help lead to outcomes that will eventually achieve your goals—in other words, you need to articulate your theory of change.

The key to a theory of change is to clarify the assumptions you're making and outline measurable indicators that will help you see if your assumptions are correct. If carefully constructed, those indicators will help evaluate whether your strategies are achieving the outcomes you thought they would.

A theory of change can include:

- Core values: Why do you want to create that particular change?
- Plan of action: What steps are you going to take to achieve your goals?
- Assumptions: Why do you think the steps in your plan of action will work?
- Desired outcome(s): What do you want to happen when you complete this project or process?
- Measures of success: How will you know when you are done?

> **Theory of Change**–A description of the process of planned social change, from the assumptions that guide its design to the long-term goals it seeks to achieve.

Breaking Down Your Theory of Change

You can think of your theory of change as a series of "if/then" statements that take you from your strategies to your goals: If more farmers learn about alternative pest control management techniques, then more farmers will use them in their fields. If more farmers use alternative controls, then they will use fewer pesticides. If they use fewer pesticides, then runoff will decrease. If runoff decreases, then the stream will be more hospitable to fish. If the stream is more hospitable, then fish population will increase.

There are a number of tools that can help you break down your theory of change into individual strategies and the ways they will help you reach your goals. These tools also discuss how a theory of change informs development of your evaluation strategy and action plan. In this toolkit, we're going to focus on creating a **logic model** because so many funders require them as part of grant proposals. However, you can also use the Open Standards methodology, which focuses on developing a **results chain**. Results chains and logic models are similar tools: They both focus on testing assumptions and developing indicators that help measure whether you're achieving your goals.

Logic Models

A logic model is a tool that helps you outline your theory of change and illustrates how your program is designed to lead to desired outputs, outcomes, and impacts. According to the Kellogg Foundation, a logic model is a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan, and the changes or results you hope to achieve. A logic model lays out how each strategy or activity is intended to lead to your desired results (outcomes and impacts). And it provides a tool that will help evaluate your success by identifying milestones and indicators along the way. The "logic" comes in when you can say that this strategy will take these inputs (resources) to produce these outputs (workshops, flyers, educational curricula, maps, and so on), which will lead to these outcomes (intermediate results), which will eventually lead to the intended impacts (goals of the project). Your logic is tested as you explain how your project proceeds from the strategies and activities to achieving the ultimate goals. See the below box for an example of a logic model based on building the capacity of landowners to protect threatened habitat and species.

Logic Model: Working with Landowners to Protect Habitat

Project Activity or Strategy	Threat/ Conservation Issue	Inputs (resources)	Outputs (SMART)	Outputs (SMART)	Impacts
Educate landowners about managing their land to protect bird populations.	Lack of awareness of plight of target species and how land use impacts those species	• 3 staff for days of educational events and 2 planning days for each event • $450 for workshop materials	• 2 or 3 day-long workshops are held • 100-200 landowners attend in total	• At least 50% of attendees report interest in managing their lands for target birds • 250 acres of habitat are managed for target species by 2011	• 1,000 acres of habitat are managed for target species by 2014 • Populations of target species are stable and viable in region by 2020

As you work through your logic model, you might find that some of your assumptions don't hold up. For example, you might be disappointed if you assume that educating a group of developers about the link between green building and reducing the threat of global warming will lead to changes in how they build. It might be a good first step, but you're likely to need other strategies—such as incentives, a campaign, training, and so on—to move from enhanced knowledge about the issue to actual behavior change.

What Is a Logic Model?

A logic model is defined as a picture of how your organization does its work—the theory and assumptions underlying the program. A logic model links outcomes (both short- and long-term) with program activities/processes and the theoretical assumptions/principles of the program.

—W.K. Kellogg Foundation

Creating Logic Models

How do you actually create a logic model? Logic models have two main parts: (1) the work you are planning to do (activities and inputs), and (2) your intended results. Your inputs and activities should lead to your intended results.

Your planned work describes what resources you think you need to implement your program and what you intend to do.

- **Program Strategies and Activities** are what the program does with the resources. Strategies are made up of a series of activities. Activities are the processes, tools, events, technologies, and actions that are an intentional part of the program implementation. These actions are used to bring about the intended program changes or results.

- **Resources or Inputs** include the human, financial, organizational, and community resources a program has available to direct toward doing the work.

Your intended results include all of the program's desired results: outputs, outcomes, and impact.

- **Outputs** are the direct products of program activities and may include types of services or products to be delivered by the program. Outputs can include workshops, maps, books, brochures, and training. They can also be considered program participation—the number and demographics of the people we reach. Outputs are often written as SMART objectives (see the box below).

- **Outcomes** are the specific changes in program participants' behaviors, knowledge, skills, status, and levels of functioning. Short-term outcomes should be attainable within one to three years, while longer-term outcomes should be achievable within a four to six year timeframe. Outcomes should be written as SMART objectives and show intermediate results—how you're addressing threats and root causes or directly protecting your conservation targets.

- **Impact** is the fundamental intended change occurring in organizations, communities, or systems within 7 to 10 years as a result of program activities. Your impacts are your project goals, which protect your conservation targets.

Your logic model should explain the threat, the inputs or resources required (and available), and the expected outputs, outcomes, and impacts of each of the program strategies you selected in Step 17. To help you develop your logic model, check out the examples of inputs, outputs, and outcomes for projects that focus on communication, education, and other social strategies, along with conservation results.

> See **Tool #30** on page 172 in **Section E** for a list of sample inputs, outputs, and outcomes. **Tool #31** on page 175 is a blank logic model that you can copy and fill in.

Keep in mind that, if you make your outputs and outcomes **SMART**, you'll be able to use them as the basis of the monitoring plan that we'll discuss on page 105.

Objectives help define what your team hopes to accomplish along the way to achieving your overall project goals. They will be linked to your short- and long-term outcomes. Like goals, your project objectives should follow SMART criteria, which include:

- **S**pecific
- **M**easurable
- **A**ction-oriented
- **R**ealistic
- **T**imed

Objectives and Indicators: What's the Link?

Objective: A statement that details a specific desired outcome of a project. Objectives should help a project reach its goals, which ultimately will help the project achieve is vision. A good objective is results-oriented, measurable, time-limited, specific, and practical.

Indicators of Success: These are observable and measurable "milestones" toward an outcome target. These are what you'd see, hear, read, count, etc., that would indicate to you whether you're making any progress toward your outcome target or not. Your objectives include indicators—the "things" you are measuring.

Setting the Stage for Evaluation

How do you know if your program is working? Logic models help you identify what you are planning to measure over the life of your project. Your outputs and outcomes contain your indicators of success—those things you will be measuring.

For example, your indicators might be the percentage of people who support existing laws, the number of species harvested, or the number of kilos of caviar sold.

While indictors tell you what you're watching for, **objectives** tell you what success looks like. By defining the measurements you hope to reach, objectives tell you and your stakeholders whether your efforts are achieving your project goals. "The number of kilos sold" is an indicator; an objective would add details such as how much and by when: "By 2012, the number of kilos of Russian caviar sold annually in these eight cities has decreased at least 30 percent."

Here's another example of a logic model that focuses on a human target—helping the environmental movement become more diverse and inclusive.

Logic Model: Creating a More Representative Environmental Community

Project Activity or Strategy	Threat/ Conservation Issue	Inputs (resources)	Outputs (SMART)	Outputs (SMART)	Impacts
A series of forums to raise awareness, build relationships, and find action-oriented solutions to the racial divide that exists in the environmental movement	• Lack of racial and ethnic diversity in the environmental movement • Lack of awareness and action around diversity issues • A fractured environmental community	• 1 staff (550 person hours, Asian) • 8 volunteers working 25 hours each (200 person hours, 1 Native American, 1 Latino, 4 Blacks, 2 Asians) • 1 facilitator (20 hours, Asian) • Other funding sources ($38,500) • Meeting space (donated) • Materials and supplies for forums ($325)	• Three forums • Three networking events • 80 people attend events (including 40 people of color), representing 55 institutions • Three news stories (print or radio) • 600 web page hits	• 70% of attendees implement at least one diversity action • 10 environmental institutions take effective steps to diversify their workplace • 94% of attendees increase their awareness around diversity issues • 97% of attendees build new (or strengthen old) relationships)	• City's environmental movement is more unified, effective, inclusive and relevant to all its citizens • City's environmental movement is a more accurate reflection of the city's demographics — i.e., at least 20% people of color • Environmental threats are more effectively addressed and dealt with • Important environmental policies and decisions include all voices and reflect the needs of all citizens

Examples of Objectives and the Strategic Actions to Achieve Them

Focused on threat abatement

Objective:

By 2010, reduce the percent cover of invasive species A to less than 5%, throughout the mixed grassland habitat in Conservation Area X.

Strategic Action:
Implement a volunteer-based program to manually control invasive species A.

Focused on enhancing target viability

Objective:
By 2010, increase the population size of juvenile Chinook salmon to more than 1,000 individuals, within the lower floodplain habitat of Conservation Area Y.

Strategic Action:
Improve juvenile salmon recruitment by changing watershed practices that cause a high degree of embedded sediments from excessive erosion.

Focused on threat abatement and enhancing target viability

Objective:

By 2015, restore the fire regime to achieve a fire return interval of five to 10 years over at least 5,000 acres of grassland habitat at Conservation Area Z (in this case, fire suppression efforts were identified as a key threat limiting the key ecological process of periodic burning).

Strategic Action:
Establish a partnership with the Bureau of Land Management fire crew to conduct annual prescribed burns.

Focused on project resources

Objective: By 2010, the project team and their program are favorably received and supported by the two key constituencies in the project area.

Strategic Action:
Engage the two key project constituents in the development and implementation of the project plan.

From The Nature Conservancy

Grizzly bear

Honey bees

Why Evaluation Matters

People and social strategies are central to conservation efforts in many different ways. Incorporating people into conservation initiatives is important for questions of equity and fairness and for incorporating all voices into conservation decision-making. It is critical for engaging local people in making decisions about their resources in ways that are culturally relevant and sustainable in the long term. So when we consider how to measure the effectiveness of conservation efforts that involve people, it is essential that we have a robust evaluation system in place from the very beginning—a system that appropriately reflects not only the conservation outcomes but also the "people" outcomes and how certain social metrics may change over time.

Evaluation is more than a survey at the end of a program and more than a public opinion poll—evaluation is a process that correlates closely with conservation planning and other planning tools to ensure that a program achieves its desired impacts. In general, the reasons for evaluation can be grouped into two categories: "formative" evaluation can generate information to help improve programs and "summative" or "accountability" evaluation can assess the impact and effectiveness of programs.

The goals of evaluation can be as varied as reporting on the cumulative impacts of the work on people and participants, ecological outcomes, the conservation movement itself, or other programmatic elements. Evaluation can also help illuminate the pathways by which program participants impact their own organizations. And the results can be used to continually enhance efforts.

Some conservation professionals avoid evaluation or only plan to measure conservation impact, not social outcomes. This may be in part because project managers are wary of evaluation in general (not sure it's worth the effort, might be used to judge them, don't know how to do it and don't have the funds to hire evaluation specialists, and so on). It may also be because they don't have a good feel for the purpose and value of evaluation in improving program success. It's true that evaluation can be used to "judge" a program and to demonstrate how the program is or is not meeting its goals. But evaluation is much more than a measurement of satisfaction or learning. Evaluation is essentially thinking critically about a program and looking for ways to continually improve its efficacy for both participants and the organization.

Use Your Logic Models to Develop Your Evaluation Strategy

It is better to know some of the questions than all of the answers.
—James Thurber

Once you've completed your logic model, your next step is to develop a strategy for evaluating your project. Your outputs and outcomes tell you what you need to measure; now you have to select the best methods for getting the data you need and analyzing it. (See pages 98 and 99.) For each indicator, you should consider the type of data required; the sources of information for those data; and what methods might best produce those data. You also need to think about:

- the amount of time and funds available for implementing the evaluation
- the staff available for overseeing the process as well as collecting, processing, analyzing, and reporting on the data
- the kinds of data that will be most convincing and important to the various stakeholder groups
- whether the evaluation is formative (ongoing, during program implementation) or summative (at some set endpoint or transition)

To help you think through your evaluation, you have a number of options:

- Develop a plan with your own team and make decisions about what you can realistically do to gather data, analyze data, and make decisions about success. See pages 98 and 99 for an overview of the tools for collecting data and the methods that can help you.

- Hire an expert (or group of experts) to evaluate your program. Include the evaluation team in all planning from the start so that as you develop your logic models, they can help provide advice about the best ways to track success.

- Use a combination: Hire experts when you need advice, but rely on your team's expertise and the great resources that are available. (See resources on page 189 in Section F.)

See **Tool #32** on page 177 in **Section E** for questions to think about when designing an evaluation strategy.

Cuttlefish

EvaluationTips

1. Evaluation is not an instrument or series of instruments; rather, evaluation refers to how a program is designed and understood. Evaluation begins at the planning stage, when the evaluation includes critical discussions of who is being served, how they are being served, the intended outcomes of the program, and how those outcomes directly tie to conservation action.

2. Evaluation should be designed for program improvement. Even great programs can be improved!

3. Before you begin the evaluation, have a plan for how you'll use the data and incorporate it into your work. How will you adapt existing programs based on the findings, and who needs to be involved in that process? How will you use the findings to plan new programs? What's your strategy for disseminating the evaluation results and ensuring they won't sit on a shelf and gather dust?

4. Good programs are based on data, not on assumptions. Well-designed evaluation instruments can provide critical insights into how to improve a program. To get the most out of feedback, make sure you ask people what changes could help improve the program, not just what they liked or disliked about a program.

5. Some data are better than no data. Good data are better than some data.

6. Clarify your questions at the start: What do you want to know from the evaluation? How do the questions relate to improvement? Ask: Who will do what with these data in order to improve or maintain the program?

7. Consider who has an interest in the evaluation, including all the stakeholders, your team, your funders, and others. Who will want to know the results? What questions would they ask about your programs? Don't forget that the staff and the audiences themselves are stakeholders.

8. Your organization should be an active part of developing the evaluation. If you're working with an outside evaluator, don't expect the evaluator to know all the questions you should be asking—or worse yet, know all the answers. An evaluation process is built on relationships between program planners and implementers, evaluators, and stakeholders.

9. If you work with an outside evaluator, make sure you **hire the right person or team**. Evaluators should have knowledge of the relevant literature, be proficient with social science research methods, have a basic understanding of your organization and your issues of interest, and be committed to disseminating the findings through journals, conferences, and other mutually agreed-upon avenues.

10. Be flexible with your evaluation plan and methods. Museum evaluator Judy Diamond (1999) says to "monitor, recycle, and rethink" and assume that your plan will evolve. This flexibility will help ensure that your evaluation fits your organization's needs.

Overview of Potential Evaluation Methods

METHOD	DESCRIPTION	BENEFITS	DRAWBACKS
Surveys	Questionnaire designed for implementation with a large group of participants; can include items that produce qualitative data (e.g., short-answer questions) or quantitative data (e.g., closed-ended items)	Allows data collection from a relatively large number of people with relatively low effort	Does not allow for deeper insight into trends, issues, learnings, and indicators; may require careful and complex sampling
Trend monitoring	Analyzing already-collected data by, for example, school systems, the census, and so on	Provides historical context of data; helps frame findings for interested stakeholders	Can be difficult to find comparable and/or historical data
Interviews	Conversational format guided by an interview schedule (list of questions or topics). Can be structured (follows the schedule exactly); semi-structured (follows the schedule loosely); or unstructured (guided by topics rather than specific questions)	Yields rich data; provides opportunity for in-depth probing beyond initial questions; can be used to further illuminate survey data	Are time consuming; require careful sampling; can produce a large quantity of data that require organization and analysis
Case studies	Field research that examines a particular phenomenon, social structure, or community	Allows for in-depth engagement with one issue, one target audience, or one geographic setting	Results may be so specific to that issue or community that they're not applicable elsewhere; data can be difficult to analyze and apply in adaptive management
Concept mapping	Participants create diagrams to describe their understanding of relationships among concepts	Provides an alternative to traditional survey methods; may be good for exploratory topics and examining pre/post knowledge and awareness	Can be difficult to analyze and use data; mapping task must be carefully crafted and explained in order to yield useful results
Community mapping	Community members collaborate to map resources, assets, and elements in a geographic area or within a social group	Provides avenue for community participation and knowledge-making; provides visual and conceptual articulation of abstract concepts	Challenging to ensure equitable participation; some community resources (e.g., sacred sites) may not be appropriate for mapping; difficult to analyze and apply to adaptive management
Focus or discussion groups	Conversational setting organized around a series of topics or questions	Group setting promotes free association and relaxed conversation; responses from each group member often prompt others to build on prior comments	Difficult to analyze data as so many different voices and perspectives are contributing; "group-think" may occur; requires a skilled facilitator

Collecting Data

There are many tools that can help you collect data. The trick is to use the right tool for what you want to measure.

What You Need	Suggested Tools
Basic Data Collection	Records, logs, journals, clicker counts, attendance, visitor records, demographic studies, document reviews and content analysis, publications, internet sources
Program Quality	Expert/peer review, observation, staff self-analysis, staff performance
Audience Knowledge and Behavior	Demographic studies, surveys, interviews, key informants, observation, anecdotes, focus groups, publications and reports, media accounts, monitoring communications of related interest groups, internet sources
Media Impact	Monitoring media coverage, content analysis, letters to the editor, letters or calls to organization or agency (pro or con) generated by media stories
Quality of Tools and Strategies	Expert/peer review, pilot tests, observation, results generated, changes in knowledge or behavior or targeted audiences, media accounts, feedback

Source: U.S. Fish and Wildlife Service; Brian Day and Martha Monroe, Academy for Educational Development, *"Evaluation" in Environmental Education and Communication for a Sustainable World: Handbook for International Practitioners.*

Evaluation, The Social Strategies, and Conservation Planning

Conservation planning takes into account the variety of pathways—some more direct than others—to achieve conservation outcomes. Much of the focus to date has been on using strategies such as science, policy, and technological interventions to directly impact and benefit a certain biodiversity target (such as a species or ecosystem). Therefore, many conservation planning models have been developed in a paradigm of natural science with conservation outcomes as the direct desired result of programs and interventions pursued by various NGOs and government agencies.

Challenges to the Model:

More recently, challenges to this model have surfaced, most specifically when considering elements of conservation that focus more on people and less on non-human animal and plant species. The conservation planning models were not initially designed to accommodate these people-oriented elements and, thus, a struggle has ensued about where and how social strategies—such as education, communications, outreach, capacity building, and environmental justice, among others—fit in more traditional conservation planning models.

In program planning for conservation, it is important that social strategies, such as education and outreach, be considered as an important means of achieving conservation outcomes, but such social strategies must, in turn, focus on affecting behavior as well as influencing attitudes and increasing knowledge.

What's the End Goal?

When social strategies and outcomes are considered as ends in themselves, the desired outcomes and impacts may look different from acres of habitat conserved or species protected. For example, a program that is designed to engage more diverse audiences in conservation activities or to enhance environmental values and knowledge among certain populations may measure success based on the audience's intention to act, increase in knowledge of environmental issues, and more robust expression of values of nature. (See page 93 for an example of a logic model that focuses on measuring people outcomes.)

Other programs may combine both social and ecological outcomes. Imagine an initiative designed to involve volunteers in efforts to improve habitat for an endangered bird species. One desired outcome may be to improve conditions on a certain number of acres (with the long-term impact of providing beneficial habitat for the species), and another desired outcome may be to involve 20 volunteers in the effort (with the long-term impact of developing their skills and motivation to continue to be involved in conservation action). Below is an example of a logic model from such a program.

Logic Model: Reducing Invasive Species through Community Education

Project Activity or Strategy	Threat/ Conservation Issue	Inputs (resources)	Outputs (SMART)	Outputs (SMART)	Impacts
Educate urban residents about invasive species, in particular Amur honeysuckle	Lack of awareness of Amur honeysuckle and the impact of these invasive shrubs on American robin and wood thrush populations	• 3 staff for day of event plus 2 staff working 3 day-equiv-alents to prepare for event • $250 for park meeting space rental • $75 for food and drinks • $100 to advertise the event via flyers, posters, and listservs	• One day-long educational event • 100 people attend the event • 50 attendees are people of color	• 10 people sign up to volunteer for future conservation action projects • 80% of attendees report inten-tion to remove invasive species from backyards	• 50% reduction of target invasive species in community • Community adopts a policy banning the sale of Amur honeysuckle from local nurseries • Urban residents demonstrate increased skills, knowl-edge, and desire to reduce invasives in the community • Increased numbers of people of color in the community feel like they are part of the conservation movement

Creating sustainable communities, economies, and lifestyles
...is the challenge of our times.
—Daniel D. Chiras

Conservation Planning, Social Strategies, and Evaluation:
Why It's a Challenge!

When you marry conservation planning, social strategies, and evaluation, several issues can make it challenging, including:

- Most conservation planning models are not built or designed to accommodate social goals as ends in and of themselves, so you're often forging new ground.

- Many conservation education programs and other social strategies are not designed to promote action that leads directly to supporting a conservation organization's mission— that is, they aren't designed to lead to specific conservation-oriented behaviors.

- Outcomes such as human behavior can be difficult to measure and learning how to construct good measures may require more expertise than is available on staff.

- The attribution problem: With social strategies having complex, multifaceted outcomes, it can be challenging, if not impossible, to attribute changes or effects to the specific intervention, activity, or program.

- Many social strategies for conservation focus on short-term or "one-shot" programs that contribute to, but may not be the cause of, knowledge, attitude, or behavior changes. Evaluation must consider the role of the program in the context of the learners' lives.

There are many resources to help you develop a logic model (or a results chain), as well as an evaluation plan. See page 90, 170, and 175 for more about developing a theory of change, logic model, and evaluation plan.

Evaluation—Why Do It?

Evaluation is becoming increasingly accepted as necessary and important—an integral part of any conservation effort. Most funders, including agencies and private foundations, not only provide funds for evaluation as part of a grant, but actually require it during the proposal process. For the most part, funders understand the importance of comparing what a project says it will do and what it actually does. In fact, many foundations have dedicated resources for guiding grantees in developing robust and effective evaluation efforts—for example, the WK Kellogg Foundation has been a leader in training nonprofits in evaluation design and implementation. (See "Resources" for links to WKKF evaluation documents.)

Unfortunately evaluation is often seen as daunting and pictured as accountability rather than an empowering opportunity for those closest to the program to make better decisions and redirect efforts. Avoiding evaluation can lead to poor planning—asking the wrong evaluation questions (or not asking questions at all), gathering data randomly and inconsistently, and leaving the work to an evaluator in isolation are among common mistakes. Because it can be difficult to pinpoint and articulate meaningful evaluation questions and to develop program models that point to clear indicators, many program managers become daunted before even beginning. However, you can avoid some of these evaluation pitfalls by simply thinking of evaluation as a way to improve program success by incorporating thoughtful up-front evaluation planning.
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Completing a Plan of Action, Kaizen Style

If you chase two hares, you won't catch either one of them.
—Russian Proverb

The last step in the planning process is to think through how you will develop an **action plan** (or work plan) and implement it. By now you've identified your overall goals, objectives, and strategies, but you still need to put together a plan of who's going to do what, when different activities will be completed, what resources are needed (both human and financial), and what your timetable looks like.

Your action plan should address these key questions:

- What are the specific action steps that need to be done?
- Who is responsible for each step?
- What is the timeline for the plan?
- What resources are needed, including people and money?

One of the best ways to develop a plan is to work with your team and anyone else who will be responsible for implementing parts of the plan. It's up to you and your team about how detailed you want the plan to be and how you want to complete it.

A Few Action-Planning Tips

The art of action Planning: You will need to break down your strategies and activities into a series of smaller action steps. You'll also need to make decisions about how much detail you want in your plan. For example, if you have an action step that includes "conduct a capacity building workshop for people of faith," do you want to list all the tasks that are needed to make that happen? (Design the workshop, invite speakers, find the location, decide on the best date, and so on.) Many people decide to create a higher-level action plan (linked to their logic model or results chain) and then create a more detailed work plan with the tasks, who's responsible, the dates, and so forth.

Who's doing what: It's important to look at what you need to do and figure out if you have the skills you need on your team, or if you need to find outside expertise. You also need to figure out how the work gets divided up among staff, consultants, volunteers, partners, and others. Mapping out who's doing what is critical—people need to own and be responsible for a specific part of the plan and they need to know what their authority is. Someone also needs to feel ownership for the plan itself—and responsible for the overall plan implementation.

Establishing the timeline: Developing a timeline will help everyone understand what they need to get done by when. For some of your steps, you might not know how long they will take—especially if you haven't done something similar in the past. In addition, most things take longer than you think—so you need to build a flexible timeline based on deadlines that you might have from funders, your organization, partners, or others.

Budgeting for success: A budget can make or break a project. You need to be realistic about how much it will cost to complete each step in your plan. With most budgets, staff, consultants, and partners are the biggest line item. This is especially true with education, outreach, and other labor-intensive activities. But other costs will include travel, meetings, materials, media, and other direct costs, as well as your organization's indirect costs (and those of other partners).

We've included a work plan template in Section E, but encourage you to use other resources, such as the CAP program activities.

For example, planning templates can be very simple (see sample below) or more complex. See page 182 for more.

Work Plan Template

Objectives:

Strategy:

Activities	Who	By When	Comments
1.			
2.			
3.			
4.			
5.			

A great resource for action planning is The Nature Conservancy's online CAP program—which complements the Open Standards.

See conserveonline.org/workspaces/cbdgateway/cap/resources/index_html

See **Tool #33** on page 178 in **Section E** for a work plan template.

Mound building ant

You will also need to develop a **monitoring plan** based on your indicators and objectives. Here's a sample: If you are not reaching your objectives by the time indicated in your plan, it's time to re-visit and adjust your strategies. That's what **adaptive management** is all about.

Sample Monitoring Plan

Indicator	Method for Monitoring	Team Member Responsible	Time to be Monitored	Objective
2 or 3 day-long workshops are held	Event held or not	Robert	Workshop dates in November and December	Two or three day-long workshops held in November and December 2011
Number of landowners in attendance	Head count	Robert	Workshop dates in November and December	Between 100 and 200 landowners attend educational workshops in November and December 2011
Percentage of attendees reporting interest in managing their lands for target birds	Survey	Janelle	Post-workshop in December 2011 and January 2012	At least 50% of attendees report an interest in managing their lands for target birds one month after attending one of our workshops, in December 2011 or January 2012 (depending on which workshop they attended)
Number of properties visited to evaluate appropriateness for cost-share programs	Project manager's records	Javier	August 2012	By August 2012, up to 90 properties have been evaluated for their appropriateness for cost-share programs
Number of management plans written	Project manager's records	Javier	January 2013	By January 2013, management plans have been written for 30-90 properties

See **Tool #34** on page 180 in **Section E** for a monitoring plan template.

Implementing Your Action Plan

The Nature Conservancy's online planning tool outlines these 10 tips for implementing your action plan. These tips apply to more than conservation planning, but can help as you implement your plan. For more about each, please visit: conserveonline.org/workspaces/cbdgateway/cap/practices/bp_9

1. Make sure the plan has at least one "owner."

2. Take a few small steps right away.

3. Don't be stopped by fear of failure.

4. Look for early winners.

5. Look for "no regret" actions.

6. Set up regular progress checks.

7. Invest in capacity.

8. Find allies.

9. Keep your eye on the big picture.

10. With patience and perseverance, you will make progress.

Think Kaizen!

If you don't have a problem, you have a problem.
—Hiro Hashimoto

Excellent firms don't believe in excellence—only in constant improvement and constant change.
—Tom Peters

Kaizen is the Japanese word that means "continuous improvement." Toyota, which bases company practice on kaizen, is committed to looking at how to overcome challenges. What's working and what's not? How can we improve practice? In our conservation work, we use the term adaptive management. Both concepts are about making sure that you have a built-in process for assessing how you're doing, revisiting your assumptions, and then making corrections as you go. Throughout the planning process, you will make dozens of critical decisions—from who's on your team to your theory of change. In some cases, you'll be on target; in others, you may have misjudged the situation, context, or problem. This ongoing learning not only will help improve your project success, but it will also contribute to our collective understanding about what works.

Adaptive management encourages you to:

- revisit your work plan periodically, and make changes as you learn more
- analyze data and use it to improve practice
- share learning with the team, your stakeholders, and the field so that conservation professionals working on similar projects can build on what we know works
- use your findings to inspire others and promote peer learning
- be brave and share failures, as well as successes

For more about adaptive management, see the Open Standards.

The Bottom Line

And finally...it's time to move from planning to action. You've already brainstormed and prioritized your strategies, articulated your theory of change, developed a logic model linked to a monitoring and evaluation plan, and completed an overall plan of action. The final step is about learning and revising as you go. It's also about sharing the results with your team and others to improve practice and move the conservation field forward. There are books written about evaluation and action planning, and we have tried not to duplicate them here, but instead to point you to some of the best resources we could find.

Ask yourself the following questions:

- Which strategies will help you reach your goals? How will you prioritize your strategies?

- Can you articulate your theory of change? Which tool will you use? (Logic models, results chains, or something else?)

- How will you measure your assumptions?

- What are the best indicators to measure progress?

- What are the smart objectives that will allow you to evaluate if you are on track?

- What data do you need to collect and how will you analyze it? What does your evaluation strategy include?

- How will you analyze your data and use the information to continuously improve your project?

- How will you share what you learn and who will you share it with?

DOs and DON'Ts

As you're thinking through your implementation plan, keep the following tips in mind.

1. Do ask who is not yet at your planning table.
Have you just included the "usual suspects"? How diverse is your group? Ask whether people of color; people from low-income communities; seniors; youth; people with disabilities; the lesbian, gay, bisexual, or transgendered community; non-English speakers; immigrants; and others are involved in the planning process.

2. Do have patience as you plan and implement your social strategies.
Remember that you may have worked in the conservation or natural resource fields for a long time, but your colleagues and target audiences may be just beginning.

3. Do think about the interests of your target audiences, and see how you can make connections to those interests. Parents, for example, are almost always interested in their children's education, and people of faith care about helping to protect God's creation.

4. Do create small, doable steps for people to take.
Don't present the threats as an overwhelming crisis, but rather frame issues as solvable. For example, instead of encouraging people to "stop climate change," focus on how they can easily improve energy efficiency—thereby reducing emission of greenhouse gases—through smarter driving practices.

5. Do incorporate hands-on and experiential learning into your program.
Taking people to the beach to see sea turtles, helping them plant native trees along a river bank, or showing them how to use GPS software to monitor the growth of invasive weeds may spur a lifetime of interest in environmental stewardship.

Cheetah with cub   Gerry Ellis

6. Don't leave any discipline out of your planning efforts.

Conservation programs will be more successful and sustainable over time if people with expertise in science, policy, education, communication, and development work together from the beginning.

7. Don't use language or messages that make sense to you, but fail to persuade your target audiences.

Even with little or no budget, you can informally test how your message works with your audiences before using it widely. When attempting to persuade unfriendly audiences, consider language that will make them less defensive and take their concerns into account, such as cultural traditions and reliance on resources for income.

8. Don't assume that if people know about a problem, they will do something about it.

Listen to your audience, and learn what makes them tick. Base your "call to action" on what they care about, rather than on what you care about.

9. Don't be overly reliant on information like statistics, monetary incentives, clever approaches to catch attention, or other techniques you may have tried in the past.

Instead, identify the barriers people have to change and make overcoming those barriers easier. For example, when possible, show how alternative behaviors could save money, are convenient, or make their kids proud.

10. Don't be stubborn and stick with a plan that's not working.

Be willing to adjust your plan based on new information. For example, an association that wanted to protect birds being hit by cars on a bridge first advocated for fencing. When fencing proved to be an inadequate solution, they successfully advocated for a lower speed limit and posting of signs to make drivers aware of the nesting area.

Orangutan

Congratulations, you made it!

Green iguana

It is good to have an end to journey toward; but it is the journey that matters, in the end."
—Ursula LeGuin

Gerry Ellis

Gerry Ellis is an award-winning nature photojournalist, writer, and conservationist. For the past 30 years, he has documented the lives of endangered species, indigenous cultures, and threatened ecosystems across every continent. He has also been involved in long-term documentary projects for many groups, including Audubon, World Wildlife Fund, Chevron in Papua New Guinea, and the Australian government. His work appears in media outlets including Paris Match, Ranger Rick, The New York Times, the BBC, and National Geographic. Additionally, Ellis has created a number of award-winning book projects, including *Wild Orphans,* the *Outdoor Travelers' Guide to Australia,* and *America's Rainforest.*

While filming orphaned baby elephants for his book *Wild Orphans,* Ellis was inspired to create and found GLOBIO, an education nonprofit dedicated to children's discovery and communication about cultural and biological diversity.

Because Gerry believes passionately in the work that Audubon and our partners are doing to engage more people in conservation, he has generously donated a number of his spectacular photographs for this toolkit.

Chimpanzees
Gerry Ellis

Change starts when someone sees the next step.
—William Drayton

Section E. Planning Tools and Other Helpful Stuff

Putting a Great Team Together

Purpose: To help identify members of your core team

What To Do:

1. With your initial team, brainstorm the type of expertise you will need on your core team, as well as expertise you will need at various times throughout the planning process. Don't limit your thinking or your list to people you initially assume should be on the team. Think about the people who could contribute the best thinking, resources, and passion to the project.

2. Prioritize your list by considering which people would be best to have at the table from the start— and who needs to stay engaged throughout. Then identify people whom you think will contribute to the project.

3. Before you invite these individuals, be clear about your expectations for their service on the project team. For example, core team members will need to devote time to the planning process.

Field mouse

With a stout heart, a mouse can lift an elephant.
—Tibetan proverb

PUTTING A GREAT TEAM TOGETHER #1

Potential Areas of Expertise	Specific Expertise You Need	Possible Core Team Members
Science		
Communication		
Education		
Policy		
Development		
Management		
Private Landowners		
Local Government		
Federal, State, and City Agencies		
Local Businesses		
Social Agencies		
Specific Individuals		
Other		

Sizing Up Stakeholders

Purpose: To consider the role of groups with a stake in your project outcome

What To Do:

1. Consider each of the stakeholder groups listed in the Sizing Up Stakeholders chart and how they might affect the outcome of your project. Will they be a help or a hindrance to your efforts? How and when should they be involved in the project?

2. Do your homework: Don't assume you know all the stakeholders at the outset, or that the list provided includes all the stakeholders relevant to your project. Research your issue and add groups that are appropriate to your situation.

3. Complete the chart for all applicable groups.

Capuchin monkey

Stakeholder Groups You Might Engage	How can they help? How might they hinder?	Level of Engagement (low, medium, high)	Possible Contacts
Private Landowners and Homeowners			
Neighborhood Associations			
Government Landowners			
Businesses			
Developers			
Labor Unions			
City Council Members			
County Commissioners			
State Legislators			
Congressional Representatives			
Outdoor Recreationists			
Wildlife Enthusiasts			
Conservation Groups			
Religious Organizations			
Schools			
Parent-Teacher Associations			
Social Agencies			
Other			

Conducting a Stakeholder Analysis

Purpose: To determine which stakeholders are most important to, and have the most influence on, the outcome of your project

What To Do:

1. Note the labels on the chart: the two axes address the degree of "Importance" and "Influence" of different stakeholders. "Importance" refers to the degree to which a stakeholder group's actions affect your goals. (For example, if your project is trying to protect forest habitat, a local timber company that is conducting clear-cuts might be considered of significant importance.) "Influence" refers to the degree to which a stakeholder group can help you achieve your project goals. (For example, legislators voting on a bill that would ban clear-cutting in your area might be considered to have significant influence. The timber company itself could also be considered to have significant influence if you think you can persuade them to change their logging practices.)

2. Organize your stakeholders according to importance and influence. For each stakeholder, consider the degree (significant, some, little, or no) of importance and influence they might have on your project and write the name in the appropriate box.

3. When you are done, your matrix will be a graphic display of who holds the most importance and influence (the group in the upper left-hand corner) and who holds the least amount of influence and importance (the group in the lower right-hand corner). Those in the high importance/influence category will be the first one to consult because they matter so much to the direction of the project. (Note that while this chart is helpful in planning your project team, you may also want to refer to it when developing your audience targets in Step 11.)

Read more: shmula.com/3276/stakeholder-analysis#ixzz10Tbn42b9

Wherever we live and whatever we do, we all make decisions and take actions that directly impact on the structure and quality of the world we inhabit.
—Peter Martin

STAKEHOLDER ANALYSIS

	Significant Influence	Some Influence	Little Influence	No Influence
Significant Importance				
Some Importance				
Little Importance				
No Importance				

Building Successful Alliances and Partnerships

Purpose: To provide information about creating and sustaining successful collaborations

Foundation Elements

1. Compelling vision. Partnerships need members and leaders who can develop compelling visions with a strong sense of purpose that defines the problem(s) to be addressed and the strategies to be used.

2. Strong, participatory leadership. Leaders need to demonstrate their eagerness to build shared ownership of the problem and outcomes; they need to see the potential for the partnership and communicate it in inspiring ways; and they need to understand and address the differing interests of all the organizations in the alliance. Leaders must help all members of the partnership understand and appreciate the ways in which the partnership can accomplish results that none of the individual members could accomplish alone. They must also encourage everyone to understand and respect the different motivations, interests, skills, concerns, and social/cultural norms that all members of the alliance bring to the table. Leaders must model trust-building actions.

3. Shared problem definition and approach. Partners need to agree upon the nature of the problem(s), the desired results, the analytical frameworks to be used, and the appropriate actions or strategies to be implemented.

4. Power equity. It is vital that all parties feel the other partners respect them and value their contributions. As well, each organization needs to feel it can influence the direction and focus of the partnership's vision and strategy.

5. Interdependence and complementarity. Early on, partners need to recognize their interdependence. Each partner brings skills, knowledge, or resources to the partnership that complement those of other members. Partners need to see that together the alliance will create new value— something the partners could not do on their own.

6. Clarity of needs. Partners come to the table not only because of their commitment to the cause and what they believe they can contribute, but also because of the ways in which they will benefit from participation. These explicit needs, if they remain unspoken, can become a source of conflict later in the process. Early on in the planning process, all partners should state clearly what they need to feel their participation is worthwhile.

7. Mutual accountability. Given the interdependence of partnerships, success depends upon each contributing member fulfilling its responsibilities and commitments in a timely fashion. Two strong motivational elements for holding partners accountable are shared ownership and a personal stake in the outcomes. However, partnerships with agreed-upon norms and sanctions, along with the willingness to exercise sanctions, are better able to hold members accountable than are those appealing only to good will.

Sustaining Elements

1. Attention to process. Partnerships need to reach agreement on guidelines that help address factors such as communication among members, decision making, multicultural and nonverbal communication, conflict resolution, power differentials, and giving/receiving feedback.

2. Communication linkages. It is wise to create dense webs or links among the partners at senior as well as operational levels. This can establish a climate for frequent and in-depth information sharing and increase understanding of the scope of talent and skill each partner can contribute to reaching the desired results.

3. Explicit decision-making processes. Members must establish clear agreements on the way partners will make decisions. While needing to be efficient, the decision-making process must also allow for active participation and consensus building. Real or perceived power imbalances among members must be taken into account when designing decision-making structures.

4. Trust, respect, and commitment. Creating complete trust and commitment takes time and requires a number of actions. Among these are people doing what they say they will do, listening with the intent to understand what others are saying, understanding and protecting the interests of all members, sharing successes with others, and taking responsibility for mistakes.

5. Credit and recognition. Partnerships that sustain motivation and achieve quality results are able to reward people justly and fairly for their successful efforts. Agreements must be reached on how partners share visibility, authorship, funding, and intellectual property rights.

Source: Based on *Successful Collaborative Partnerships: Key Elements and a Self-Assessment Inventory,* by Linda Spink and Deborah Merrill-Sands, May, 1999, trg-inc.com/resources/PartnershipSelf-assessmentformwithcover2.pdf

Crowned crane

Cheat Sheet—Conducting a Community Assessment

Purpose: To provide guidance on how to gather information about the community you are working in

A Cheat Sheet on Conducting a Community Assessment

Community assessments allow you to quickly and accurately define and understand the community in which you intend to work so that you can execute your project most effectively.

What is a community?

A community can be a place, a group of people, or a combination of both. Often, communities are defined by a geographic area. But they also can be defined by a common interest or characteristic—in which case, the people included may or may not live in the same geographic area. Community assessments not only help you better understand a community, but they also help you refine your definition of community.

You can use community assessments to reach a variety of goals, from broad to specific. If your project is not yet clearly defined, a community assessment can help gather baseline information that, in turn, helps set appropriate goals and develop effective strategies. On the other hand, if your project already has a clear goal and strategies, a community assessment can help refine the strategies you've identified. For example, the assessment might help you identify audiences most affected by your issue, understand their needs and desires, identify barriers they may face in adopting the behavior changes you seek, and so on. In either case, community assessments can serve as a valuable tool in project planning.

Community assessments can also gauge a community's readiness for change. Researchers at Colorado State University have developed a system for assessing a community's preparedness for taking action on an issue, ranging from no awareness to a high level of community ownership. Knowing where your audience lies on this scale can assist in selecting and refining strategies that will work. The approach is described in the publication *Community Readiness: A Handbook for Successful Change* (available online at: triethniccenter.colostate.edu/crhandbook.shtml).

In its *Community Culture and the Environment Guide* (available online at: epa.gov/care/library/community_culture.pdf), the U.S. EPA describes six steps to community assessment, summarized below.

Step One: Conduct Pre-Project Planning

Before your assessment project can begin, you should clarify your project's ultimate goals. Ask yourself questions such as, "To what extent have we defined our ultimate conservation goals?" "How well do we understand why we're undertaking this community assessment?" and "How well do we understand the community we're assessing?" The answers to these questions can help gauge your organization's readiness to start the community assessment, and what you expect to gain from it.

Next, you'll need to form a team. Your team should consist of five to ten people with diverse backgrounds and interests, and ideally would include at least one person with experience in conducting assessments. You'll also need to consider the pros and cons of involving stakeholders in the assessment phase. Working independently might be faster and offer you more control of the goals and methods. But, involving stakeholders can help integrate more ways of thinking, broaden the scope and utility of the project, and enhance the potential reach in the community, among other benefits. (This can be the same team you use for your overall project planning or a team that is specifically designed to help you conduct the assessment.)

Pre-project planning also involves searching for similar studies that have already been completed in your community. Such studies can provide baseline information from which you can work. Past results can also help refine your goals and scope, identify key information sources, and suggest potential partners and resources. Check with local college and university faculty, public health and extension agents, or local firms or nonprofits that work in your area of interest for leads.

Finally, consider your financial resources as you begin planning; they'll determine the scope of your assessment. Consider carefully the expected costs (including staff time, travel costs, outside technical assistance, and costs associated with certain assessment methods) and possible funding sources (including available funds in your existing budget, grants, and in-kind contributions). For example, another group might be willing to contribute resources if you share the results.

Step Two: Define Goals and Community

The next step in conducting your assessment is defining your goals. This will likely be an iterative process as you learn more about the community. But it's important to start out with clear goals that allow you to gauge your progress. Typically, this involves reviewing your situation and needs, brainstorming all possible goals, developing and applying evaluation criteria to your goals, and refining and narrowing your goals as you learn more. Remember that goals should be specific, measureable, and action-oriented, and should be connected to a timeframe for monitoring and evaluation.

You'll also need to define your community. A community can be defined by physical or administrative boundaries, local groups or organizations, local activities, and community participation roles. You should begin your assessment by analyzing these different aspects of your community and defining the community you plan to assess. But, your assessment is likely to affect what you know and think about your community, and this is something you're likely to revisit and revise throughout the community assessment.

The EPA community assessment guide provides helpful worksheets for considering your goals and defining your community.

Step Three: Identify Community Characteristics

This step helps you identify what information will help you understand your community and its interests. The following are some of the community characteristics you might assess:

- Community boundaries
- Community capacity and activism
- Community interaction and information flow
- Demographic information
- Economic conditions and employment
- Education levels
- Environmental awareness and values
- Governance
- Infrastructure and public services
- Local identity
- Local leisure and recreation
- Natural resources and landscapes
- Property ownership, management, and planning
- Public safety and health
- Religious and spiritual practices

For example, your assessment might begin with geographic boundaries and landscape characteristics that help you better define the physical community. Then you might establish a baseline with objective information such as demographics, employment, and infrastructure. Next you might focus on subjective characteristics such as environmental values and religious practices. The specific characteristics you study will depend on your project's goals. The EPA guide provides extensive information and planning tools related to each of the community characteristics you might explore.

Step Four: Identify Assessment Methods

Once you have defined your goals, defined your community boundaries, and identified the characteristics you want to analyze, you need to select the methods that will help you collect the desired information. The following are some of the most common data collection methods:

- **Background research**—Collecting information from existing sources

- **Census data research**—Using U.S. Census data to collect demographic and economic information

- **Focus groups**—A facilitated meeting of community members in which the moderator helps explore the participants' feelings, beliefs, knowledge, and attitudes related to specific issues or topics

- **Interviews**—Asking individuals or small groups questions and recording their responses, which can be analyzed for patterns or themes that reflect perceptions, opinions, knowledge, and so on

- **Maps and geographic research**—Using maps (both current and historical) can reveal physical boundaries, the relationship between the community and the larger geographic context, and changes over time

- **Meetings**—A gathering of community members representing a variety of interests in which participants discuss community issues and provide input that can help define the community, refine goals, and identify and coordinate with stakeholders

- **Observation**—Watching and tracking the behavior of community members, or tracking other phenomena, to understand or confirm community characteristics or to complement other assessment methods such as surveys and focus groups

- **Regional economic data research**—Organizing specific information about industries, jobs, employers, income, and other factors to understand both economic health and the role of natural resources in a community's economic base

- **Social maps**—Collecting, organizing, analyzing, and illustrating social data about a community. Social maps illustrate connections in a community and can include asset maps (focused on capacities and assets in the community), cognitive maps (based on personal perceptions and experiences), concept maps (identifying causes and effects in a community), and social network maps (depicting patterns of information, communication, and relationships).

- **Surveys and polls**—Written questionnaires, online surveys, or interviews (in person or telephone) that collect information from community members. Survey responses can be linked with characteristics of the respondents (such as income, employment sector, residential location, or others) for the purposes of comparison between groups.

- **Visual methods**—Use of photographs, video, illustrations, or other methods to gather information about social, cultural, or ecological features of a community or to help create a tangible vision for the future

The EPA guide contains specific guidance on how to use each of these assessment methods. Rotary International also has developed a publication titled *Community Assessment Tools,* which includes descriptions of some common assessment methods. (The guide is available online at: http://www.rotary.org/ridocuments/en_pdf/605c_en.pdf.) Finally, USAID has developed a short publication titled *Using Rapid Appraisal Methods* (available online at: http://pdf.usaid.gov/pdf_docs/PNABY209.pdf). This guide provides an overview of methods that can be used to quickly gather key community information.

Step Five: Analyze Results

Analyzing the results of your data collection efforts requires five steps:

- **Store** the data in a way that makes it readily accessible.

- **Revisit** your goals and community characteristics to reestablish what you wanted to know.

- **Organize** your data by the method you used to collect it.

- **Analyze** the data by type (quantitative, qualitative, and graphic).

- **Summarize** and present your findings in a way that others can understand.

The EPA guide provides direction for analyzing quantitative, qualitative, and graphic data.

Step Six: Select and Implement Best Strategies

Based on your results, input from your team and stakeholders, and the initial goals you set out for your assessment, your assessment can help you select and implement the best strategies for your project. And just as the community assessment results inform your strategies, your strategies might point to the need for further community assessment work in the future.

Assessing Your Community

Purpose: To help you conduct a community assessment prior to starting your project

What To Do:

1. Use Tool #5 to guide you through completing this worksheet.

2. Make notes about how you will implement each step, the information you consider relevant to your project, and outside resources you may require.

Thomson's gazelle   Gerry Ellis

Notes: How will you implement the step? What information is relevant to your project? What outside resources do you require?

Step One: Conduct Pre-Project Planning	
Step Two: Define Goals and Community	
Step Three: Identify Community Characteristics	
Step Four: Identify Assessment Methods	
Step Five: Analyze Results	
Step Six: Select and Implement the Best Strategies	

Defining Your Project's Scope

Purpose: To define the geographic boundaries of your project and what you intend to accomplish

What To Do:

1. The scope of your project will have three important components: (a) a written articulation of the geographic area within which your project will take place; (b) a map of the geographic area of your project with a clear line delineating the boundary; and (c) a statement that describes the nature of your project.

2. Working with your core team, complete each of the components on the worksheet.

3. **IMPORTANT:** After you have finished, take a moment and reevaluate your team's membership and your list of stakeholders. If your boundaries differ from your initial ideas, there may be additional groups or individuals you may want to include.

Project Area Description:
Using all available information and data, including maps (ideally GIS-based mapping software), define and describe your project area. Your project might range in size from a local park to an ecoregion that stretches across country borders. Write a short summary of the geographic scope and why it makes sense for what you're trying to do.

Project Area Map:
Have a physical map of the general area within which you intend to conduct your project. Discuss and define the actual physical limits of your project. Draw a clear and complete line on the map defining the physical limits of your project area. If you can't draw a definitive line, then your thinking isn't yet clear. It's critical to have the most detailed and current map of the area you want to work in so that you can outline where you intend to work.

Project Description:
Describe the purpose and nature of your project. In a nutshell, what are you trying to do? What do you hope to accomplish? Keep this description to fewer than 300 words.

Crafting A Vision

Purpose: To envision success and summarize what will change as a result
of your project

What To Do:

1. With all of your team members together, ask each to imagine what the end of the project looks like. Pretend you have just completed your project and it has succeeded beyond your wildest dreams. What does this look like? What exists in your project area that wasn't there before?

2. Have each team member take 15 minutes to write down any number of statements that describe the area. Think both in terms of the ecology of the place and the social support or engagement. Write each statement on an individual 3x5 (or larger) sticky note.

3. Reassemble the group. Have each person come to the front, read each of his or her statements aloud, and post them on the wall. Post similar thoughts together, clustering vision statements that fall under a common theme. In the end, you'll probably have a dozen or so statements that fall into a smaller number of themes.

4. Divide your team into groups of four or five, with each team taking one cluster of statements and redrafting them into a single statement. When assembled these three or four statements (or however many clusters you had) will form the basis for your vision statement.

5. Assign one person (the best writer on your team) to redraft the statements so there is a common voice. Circulate this draft vision statement back to the group for input.

Identifying Your Conservation Targets

Purpose: To help you define and set goals for the biodiversity and human welfare targets you hope to protect

What To Do:

1. Give your team members 10 to 15 minutes to write specific conservation targets on individual sticky notes (one target per note). Conservation targets are the "things" you hope to protect or conserve. They can be biodiversity targets or human welfare targets. In some cases, targets can be "nested," meaning that one target, such as sage grouse, is embraced by a larger target, in this case sagebrush habitat, where conserving one necessitates conserving the other.

2. Have each team member read each of his or her conservation targets aloud and post them on the wall. Repeat with each member's targets, clustering similar targets and attaching identical targets together in a sticky-note chain.

3. Discuss and come to agreement about which are your key targets, which are nested targets, and which are not central to your project. Record your targets on the matrix below. (Note that your decision about which to focus on may depend on which will resonate more with your audience. Defining your audiences is addressed in Chapter 4.)

4. Set a broad goal for each target. Depending on the size of your team, this may be done best by working in small groups, with each group taking one or two targets. Goal statements should be short and should articulate the condition you hope to achieve through your project.

   See chart on the following page.

Conservation targets	Type of target		Any nested targets?	Goal for this target?
	Biodiversity	**Human Welfare**		
Target 1				
Target 2				
Target 3				
Target 4				
Target 5				

Brainstorming Threats

Purpose: To help you identify the threats to each of your conservation targets

What To Do:

1. Write each of your conservation targets (biodiversity and human welfare) on a large index card (one per card) and post them on a wall.

2. Divide your team into small groups. Have each group think about the direct human activities and the altered natural processes brought about by human activity that threaten each target. Have them write the threats on separate sticky notes (one per note) that are large enough to be viewed from a distance.

3. Have each group put its sticky notes under the related target on the wall, grouping similar threats. As a full group, quickly summarize the threat represented by each cluster.

4. Have the group prioritize the threats based on the criteria that make the most sense for your project. The Open Standards suggests focusing on scope, irreversibility, and severity, but you could also include urgency, feasibility of tackling, and other criteria—or hold those for later. For added perspective, the facilitator can use discussion techniques borrowed from another culture. For example, the facilitator might suggest that nobody can speak for a second time until everyone has spoken for a first time. (See the activity in Step 10 if you want to brainstorm threats and root causes in the same session.)

5. After your team has determined the threats for each target, record them on worksheet #10, one worksheet per target. You'll use this same worksheet again when you identify root causes in Step 10 (Tool #11).

See the following page for the Tool#10 worksheet.

Targets:	
Threat #1	**Root Causes**
Threat #2	**Root Causes**
Threat #3	**Root Causes**
Threat #4	**Root Causes**
Threat #5	**Root Causes**
Threat #6	**Root Causes**

Brainstorming Root Causes

Purpose: To help identify the underlying causes of the problems your conservation targets face

What To Do:

1. For each threat identified earlier, it's important to dig deeply to understand the root causes. People have many reasons for doing what they do (and don't do), and if you want to influence more environmentally friendly and sustainable behaviors in the short and long term, you'll need to uncover the underlying causes or motivations. For example, people may be subdividing their land because funds for their retirement are wrapped up in the equity of their property. And if there were incentives to hold onto property, it might help people consider other options. Or herbicides may be running off into waterways because people don't like dandelions or clover in their lawns. However, they may not realize the connection between using pesticides and water pollution, or they may not have been shown any alternative to the traditional green lawn.

2. Divide your team into groups of two or more and assign each group one of the identified threats (from Step 9). Ask the team members to brainstorm about the causes of each threat and how they are harming the targets. Encourage them to use the following Five Whys exercise to get to the underlying causes:

   - State the problem that you are trying to resolve.
   - Ask the first why: "Why do you think this is happening?"
   - Using the answer to the first "why" question, ask again, "Why is *this* happening?"
   - Repeat this process until you get at the heart of the problem. This may take only two or three "whys," or it may take more. You will know when you get there.

3. When the groups are sure their root cause focuses on the underlying causes of specific human behaviors that are contributing to the problem, have them write the root causes on index cards and connect the cards to the appropriate threat.

4. Record your root causes in the second column of the chart started in Step 9, Tool #10.

Variations:
You can also do this as a full group activity and combine it with the brainstorming activity in Tool #10. The group can begin by brainstorming the threats to the targets, and then brainstorm the root causes. You can list the threats on a flip chart at the front of the room or on a computer projected on a screen. You can also highlight one threat and have the entire group work on the same issue throughout.

Strategic Thinking Filters—Changing the Angles of the Kaleidoscope

Purpose: To help identify the underlying causes of the problems your conservation targets face

What To Do:

After you have brainstormed a list of root causes (Tool #11), your group will need to start sorting through them and thinking strategically about them. This activity will assist with that process, and the methods used here will apply later when you are deciding among audiences and possible strategies to address the issues.

Thinking strategically and agreeing on priorities can be challenging for any team, especially when they involve multiple partners and funding sources that are collectively shared. The following six strategic thinking lenses can help your team sort through a myriad of possible root causes to address in order to achieve your goals.

The Six Lenses

1. The Urgency Lens helps you sort for the most immediate and highest priorities. Analysis of urgency is guided by how you see the significance of the problem and the need to address it swiftly if adverse consequences are to be prevented.

2. The Building Block Lens sorts for root causes that are prerequisites to address before other interventions can be initiated or other priorities addressed.

3. The Advocacy Lens helps you identify problems that—though not at the top of your list—are priorities for government partners and other stakeholders, and if addressed will build goodwill to tap later for support with tougher challenges.

4. The Feasibility Lens singles out problems that are fixable with the resources available and considerate of partners' priorities. There is a high probability that the current environment enables the team to address these issues and achieve agreed upon results.

Strategic Thinking Lenses

1. Urgency Lens—If not addressed soon, there could be adverse consequences.

2. Building Block Lens—Needs to be tackled before other priorities can be addressed.

3. Advocacy Lens—Would be welcomed by government partners and other key stakeholders, building goodwill to tap later for tougher challenges.

4. Feasibility Lens—There is a high probability that the current environment enables the team to implement and achieve agreed upon results.

5. Commitment Lens—There is enough strong commitment within the team to see it through to implementation and action.

6. Impact Lens—Can potentially achieve significant conservation impact.

5. The Commitment Lens sorts for the problem for which there is enough strong commitment within the team to address, in spite of workloads and other priorities.

6. The Impact Lens helps you zero in on root causes that, if addressed, could potentially achieve significant impact in terms of your goals.

Part 1: Introducing the Strategic Thinking Lenses (about 40 minutes)

Here are some ways you can introduce the strategic thinking lenses to your team.

1. Start by posting on the wall the conservation targets and root causes your group came up with in Steps 9 and 10 (**Tools #10** and **11**).

2. Ask participants to look at the Strategic Thinking Lenses in the box. (Present the six strategic lenses on a PowerPoint slide or hand them out to each group.) Ask participants to think of each lens as bringing us clarity from one angle. Using each lens one at a time can reveal dimensions, distinctions, and patterns not visible otherwise. (These six lenses are fairly universal "generic" lenses; your group may have some additional lenses that are more specific to your project. Think about what those might be; you will have the chance to look at them after this next exercise. For example, you might want to include a "long-term change" lens, which focuses on threats that must be addressed to sustain long-term change.)

3. Divide your team into small groups and assign one lens to each group. If you have team members from different partner organizations, make sure that they are spread out across the groups. Explain that each lens is assigned a different color (see box) and provide each group with its colored marker or dots, as suggested in the box.

> Urgency lens—**Red**
> Building block lens—**Blue**
> Advocacy lens—**Green**
> Feasibility lens—**Orange**
> Commitment lens—**Yellow**
> Impact lens—**Black**

4. Invite the lens-specific groups to review the list of root causes posted on the wall. Explain to each lens group that they must agree as a group whether to place a dot next to a root cause, indicating that they believe the root cause should be addressed given the lens. They can only place one dot per possibility. They have unlimited dots in the review of all the root causes, but they should think of each dot as special, to be applied wisely. By placing the dot next to a root cause, they are collectively saying it needs to be addressed when looked at through their assigned lens.

Part Two: Determining Strategic Priorities (about 20 minutes)

Here are some ways you can introduce the strategic thinking lenses to your team.

Facilitate a discussion about what the different colored dots and cluster of dots are revealing. Start this discussion by asking each lens-specific group to give some highlights on what they learned by only looking through their assigned lens. These highlights should be brief and not get into specific placement of dots. Then ask people to put aside their specific lens. Say you want them to now think and discuss together as a team what the placement, patterns, and cluster of dots reveal about your strategic priorities for your project. (Use the questions in the box as a PowerPoint slide or distribute them to help guide the discussion.)

Responses to questions 1 and 2 will surface preliminary conclusions about how the team is seeing priorities. As part of this discussion, ask what the surprises are for them, if any. The intent of this question is to get into the open at the start of the discussion any conflicting perspectives about your project's priorities. These conflicting perspectives should be acknowledged and not

1) What are we seeing with the placement of dots in each topic area?

2) Across the topic areas, where are the greatest concentration of dots for any given possibility?

3) What is your reaction to where the red (urgency) dots are placed?

4) Which clusters of dots have both a red and a blue (urgency and building block) dot? What is the message about these clusters?

5) Which clusters have a red, blue and black (urgency, building blocks, and impact) dot? What is the message about these clusters?

6) What is your reaction to where other black dots are placed? If they are with a cluster of green, orange or yellow (advocacy, feasibility, or commitment) dots, what messages to these additional dots convey?

7) What is the overall picture we are seeing?

debated. The next set of questions will help bring greater understanding about specific priorities and could change perspectives or at least mute some potential debate points.

With the third and fourth questions, the discussion will illuminate perceptions of urgency across the program, and what participants think will need to be addressed first. For each root cause on the flip charts with both a red and blue dot, ask if they agree it is a first priority. Place a large check mark next to needs and interventions they agree are first priorities.

Question 5 is critical. The black dots add perceptions of significant impact to the check-marked first priorities. Circle in red the needs and interventions with all three dots—red, blue, and black. Ask participants to share perspectives about what the cluster of these three dots says to them. If the cluster also includes a green, orange or yellow dot, ask what these additional dots say. Any of these three—the advocacy lens, the feasibility lens or the commitment lens—only magnifies the power of the merged lens focused on an important strategic priority.

There will also be important strategic priorities that will not have a red or blue dot. They may not be seen as urgent or as a building block. Question 6 will begin to pinpoint these additional important strategic priorities. If these needs and interventions also include a green, orange or yellow dot, ask what these additional dots say. If the group agrees the root cause is an important strategic priority, also circle it in red. Question 7 will help you cement the conclusions about strategic priorities emerging from the strategic lenses exercise.

Further Reading

In this activity, we encourage you to review the article from Rosabeth Moss Kanter about kaleidoscope thinking and think about how to change the angle of the kaleidoscope and to see the same information or possibilities through different lenses: *Leadership for Change: Enduring Skills for Change Masters,* Rosabeth Moss Kanter. (Available from hbsp.harvard.edu)

Charting Your Way To Your Target Audiences

Purpose: To help you identify which audiences are important to your project and why

What To Do:

1. For each of the previously identified threats, identify the specific individuals or groups who are responsible for the root causes. These are called drivers. Consider these drivers as prospective target audiences, but also think about those who can influence them. To help your core team members think broadly about potential audiences, use the Three Whos:

   • Who knows
     ...about the situation, or who has most of the information we need to solve it/realize it?

   • Who cares
     ...that something needs to be done about it?

   • Who can
     ...do something about the solution?

2. Also ask the following questions:

   • Which audiences are likely to be most affected (either positively or negatively) by this issue?
     (If you completed a stakeholder analysis in Step 2, Tool 3, you will already have done this work.)

   • What other audiences are likely to have an interest in this issue?

   • Who has not yet formed a position on the issue (are there any neutral audiences that could be helpful)?

3. For each root cause you want to change, list the drivers, possible target audiences, and priority audiences on the chart. Explain why you prioritized your audiences the way you did.

   See the following page for the Tool #13 chart.

ROOT CAUSES (including behaviors)	DRIVERS (who's causing the problem)	POSSIBLE TARGET AUDIENCES	PRIORITY AUDIENCES and WHY

What Do You Know About Your Audience?

Purpose: To help you identify and analyze possible target audiences

What To Do:

Use the following questions to help guide your thinking about target audiences for your project. Some questions will be more relevant than others.

WHAT DO YOU KNOW ABOUT YOUR AUDIENCE?	#14
UNDERSTANDING Target Audiences:	
What don't you know about them that you wish you did?	
How could you find out what you don't know?	
Which audiences are likely to be most affected (either positively or negatively) by this issue?	
What other audiences are likely to have an interest in the issue?	
Who has not yet formed a position on the issue (neutral audiences)?	
ANALYZING Potential Audiences:	
How will you conduct audience research—what tools and strategies will you use?	
What are the concerns expectations, perceptions, and biases of the audiences?	
What cultural, social, or demographic characteristics do members of these audiences share with one another? How do the audiences differ?	
How does each audience receive information?	
PRIORITIZING Audiences:	
Where do you expect support and opposition to come from?	
Which audiences will have the most influence in determining the outcome of your biodiversity targets? Your human welfare targets?	
Which audiences need to be addressed first? Why?	

From the U.S. Fish and Wildlife Service, Public Outreach and Education

Picking Your Target Audience

Purpose: To provide information and guiding questions to help you select, understand, and reach your target audience

What To Do:

Many communication efforts fail because they target everyone. In reality, most outreach should target a specific group of people. Make sure you can define the allies you need so that you can focus messages, resources, and strategies where they count.

1. Name your "Wish List"
If you could convince 130 people to embrace your message today who would they be? Why? What can they do for you? What do they think about your issue now? What are the key things they need to believe to help you? Focus on influencing this target audience.

2. Not a Popularity Contest
Unlike commercial advertising and communications, advocacy communications is usually not about raw numbers. Advocacy communications is about targeting key constituencies to influence their behavior and attitude in order to create change. Who can help deliver your message to the target audience with the most accuracy and chance for success?

3. Find the "Friend of a Friend"
Who will your target audience listen to? Where does your target audience get their information? Who are the most influential people to your targets? Where do the target influentials get their information? Where can you reach them? Who influences the people that influence your target? Where do they get their information? And so on and so on.

4. Draw Your Target Circle
Do not begin your outreach efforts until you can accurately draw some target circles of influence around your audience. Who is in the center? What is the message they need to understand? What is the action they need to take? Each ring around the circle symbolizes an audience that can help you reach the target audience.

5. Reach into the Circle
An effective communication strategy will reach into your target audience. Be direct: never use the media if a meeting will work.

6. Message Volume
Use the target circles to draft your strategy to move your message into the center as often as necessary to create change. Use multiple strategies to assure your message gets to the target.

7. Create Feedback Loops
Test the accuracy and effectiveness of your message delivery by asking friendly members of each "ring" what they are hearing. Do they understand your message? Will your target audience?

8. Adjust Strategy and Message
Communications plans are NOT set in stone. Media work is opportunistic. Change things around if your message is not getting to the target audience. Simplify your message if it is garbled. Communications plans should adapt to changing realities of target responses and opposition tactics.

Pick Your Audience Top Ten from Green Media Toolshed, greenmediatoolshed.org
undp.org/comtoolkit/why-communicate/why-core-concepts-target.shtml

Tool #16 **Painting Your Audience Portrait**

Purpose: To characterize your target audiences and provide you with information about how to reach them

What To Do:

1. Paint a vivid picture of a specific audience you need to engage.
   Try to describe them by thinking about the answers to questions like this:

   • Man/woman/girl/boy?
   • How old?
   • Do they work? Where? How many jobs?
   • Go to school? Where? How do they get there?
   • Do they drive? What kind of car?
   • What's their favorite thing to do?
   • What keeps them up at night?
   • Do they have extra money? How do they spend it?
   • What do they dream of?
   • Who are their friends/people they hang out with?
   • What's their biggest treat?
   • What's their biggest fear?
   • How do they feel about themselves?

2. Imagine the story of how your audience got engaged: Where did they start? What happened?

Source: Diane Thompkins, The Curious Company. TogetherGreen training, 2007.
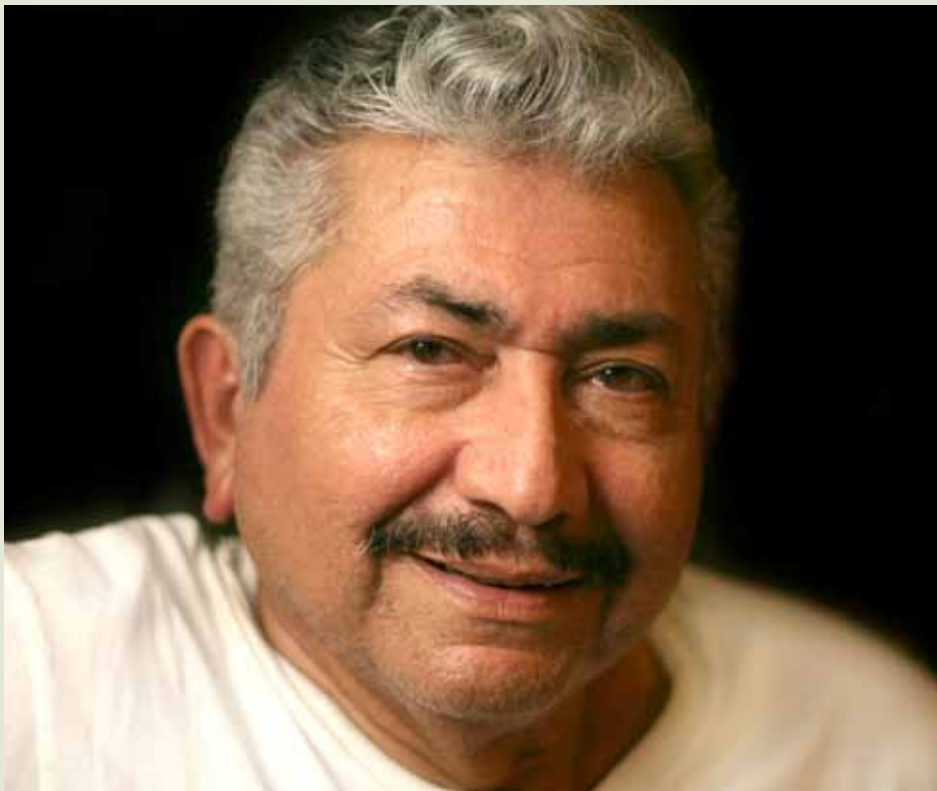
Getting Buy-In and Support!

Purpose: To help you analyze your audiences, tailor meetings and presentations to their needs, and build support for your project

Focusing on the Audience

Overall Audience Analysis

Before beginning to plan for any meeting or presentation, you should have a good understanding of your audience (e.g., the interest group). If you fail to analyze, you risk holding a meeting or delivering a presentation for which they have no need or interest. Use your analysis to help you determine your meeting or presentation goals and to help you plan the meeting or presentation in a way that "speaks" to the unique needs of the audience.

Here is a list of questions you can choose from to analyze your audience. In most cases you will want to talk to someone who knows a lot about the audience and get answers to those questions you feel are important. You will also want to talk to some of the potential audience members directly to get additional insights.

Questions to Ask

1. What is the main purpose of this meeting or presentation?

2. What are the key messages you would like your audience to understand and accept?

3. What information presented will already be well known or familiar to them?

4. What information will be new or surprising to them?

5. What will be your audience's general attitude? Friendly? Receptive? Neutral? Unpredictable? Hostile?

6. What general level of knowledge (technical or otherwise) will your audience have compared to your own?

7. Keeping your audience in mind, what technical aspects of the topic should be presented in a simplified, non-technical way?

8. What main objections are likely to be raised against your position?

9. What questions might be particularly difficult to handle?

What's In It for Them? (WIIFT)

Different audiences—homeowners, renters, communities of interest, businesses, political groups, and more—have serious concerns of their own. Sit in their seats and imagine how they will listen to what you have to say:

1. List the primary benefits of your talk to the particular audience.

2. Try to determine their needs so you can include them in your meeting.

3. Get inside their minds and discover their interests and values. Then acknowledge them.

4. Decide where you might have mutual benefits and point them out.

Remember...

The power in speaking to "what's in it for them" is to remind you that your audience is made up of real people with legitimate interests. Your most persuasive meetings and discussions will address those interests and concerns.

Set Your Communication Goal

Decide what your goal is for the meeting or presentation. Here are some questions that might help you define your goal:

1. Why are you meeting with this audience?

2. What do you hope they will take away with them after the meeting?

3. What outcomes do you want?

4. What specific actions do you want to see happen as a result of this meeting?

5. Two months from now, what do you want people to remember?

Your goal should be related to your audience analysis and to "what's in it for them."

Source: Steve Joyce, Training Resources Group, 2010.

Mountain goats   Gerry Ellis

Short or Long?

....

Purpose: To determine which audiences should be targeted for short-term action, and which can influence values and attitudes and help sustain successes for the long term

What To Do:

1. List the target audiences you have identified. For each, think about whether they have a role in shorter-term changes that will help achieve your goals, longer-term shifts in values, attitudes, motivations, and skills that will help sustain successes, or some combination of both.

2. Consider additional audiences who might be involved in helping to achieve or sustain project goals over the long term, such as educators, young professionals, or community youth.

3. Record ideas for how to potentially involve each audience in the short and long term.

Walking stick   Gerry Ellis

SHORT OR LONG?

PRIORITY AUDIENCES	SHORTER TERM	LONGER TERM

Options Matrix

Purpose: To help you identify the behaviors you want to change and explore possible options for changing them

What To Do:

1. In the first column of the following chart, list a target behavior that needs to change. (Refer to the "root causes" you listed in chart #10/11.) As a group, brainstorm and identify sustainable alternatives to this practice. (You might have to suggest alternatives if the participants are not aware of any.) List each target behavior and possible alternatives on a separate sheet of paper. NOTE: You can also do this activity on a flip chart or computer.

2. List the uses and benefits of each alternative. This information should come from the root cause analysis. Compare the alternative practice with the unsustainable practice in terms of benefits. Does the new practice provide the same benefits? Is it doable and practical? Is it cost effective?

3. On the next row, list the possible environmental impacts, and compare the new practice to the behaviors you want to change. Does the new practice avoid the negative impact of the existing practice? Does it have any negative impacts that can be addressed? Is it a better practice than what is currently taking place?

4. Finally, take a look at the barriers to adopting any new behaviors. Have the group list all the barriers to adopting the new practice, such as time, cost, lack of technology, lack of skills, lack of knowledge, tradition, cultural barriers, and lack of access. Ultimately, your conservation success will depend upon addressing and overcoming these barriers.
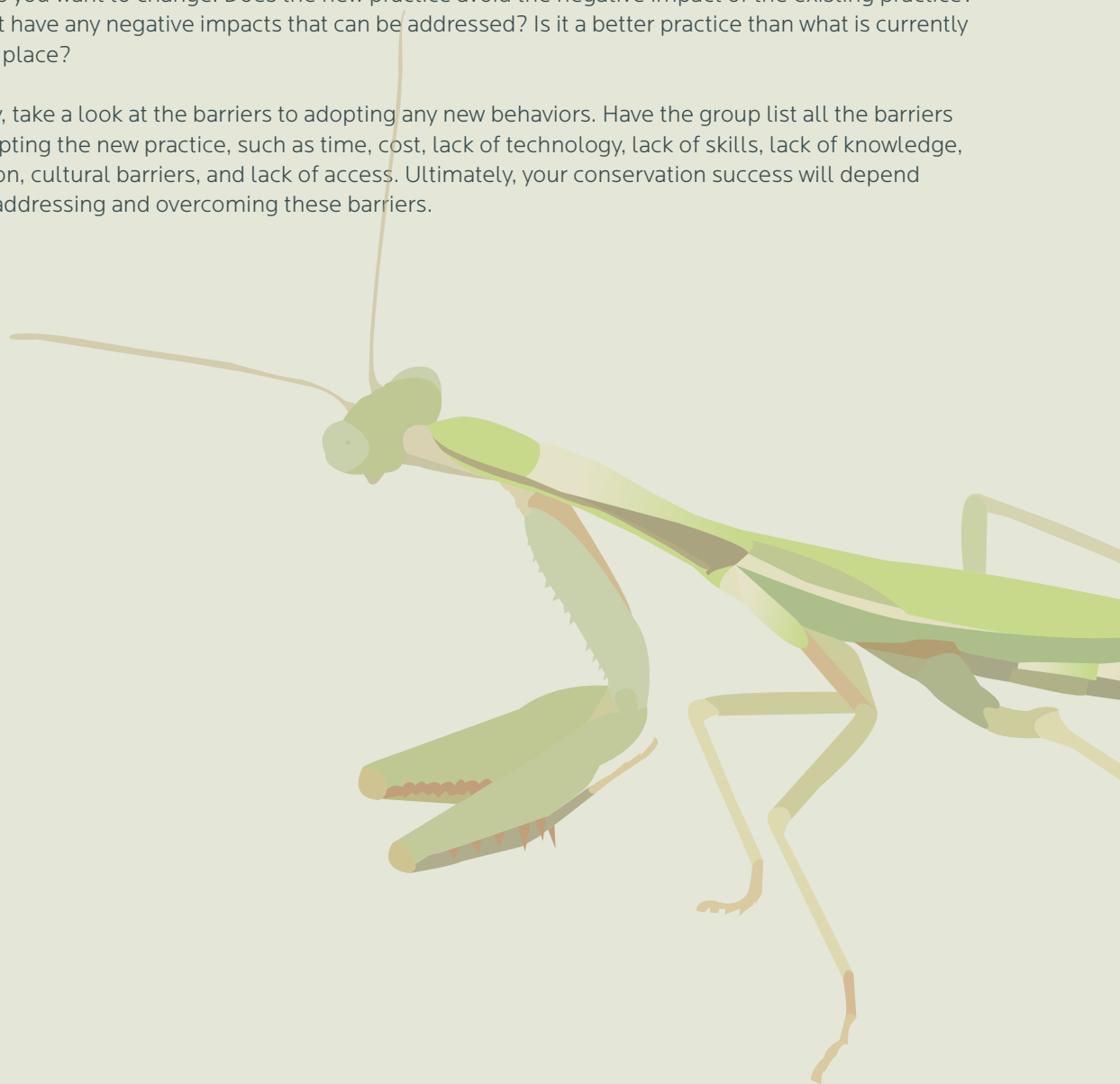
	Target Behavior	Option #1	Option #2	Option #3	Option #4
Uses/Benefits of the Behavior					
Environmental Impact of the Behavior					
Barriers to Adopting New Options					
How to Overcome the Barriers					

Source: *Targeting Behavior,* Mike Matarasso, Conservation International, 2008.

Strategic Influencing

Purpose: To provide you with information and exercises that will help your team learn more about your audience and how to work effectively with both friends and foes

Negotiating Agreement and Building Trust
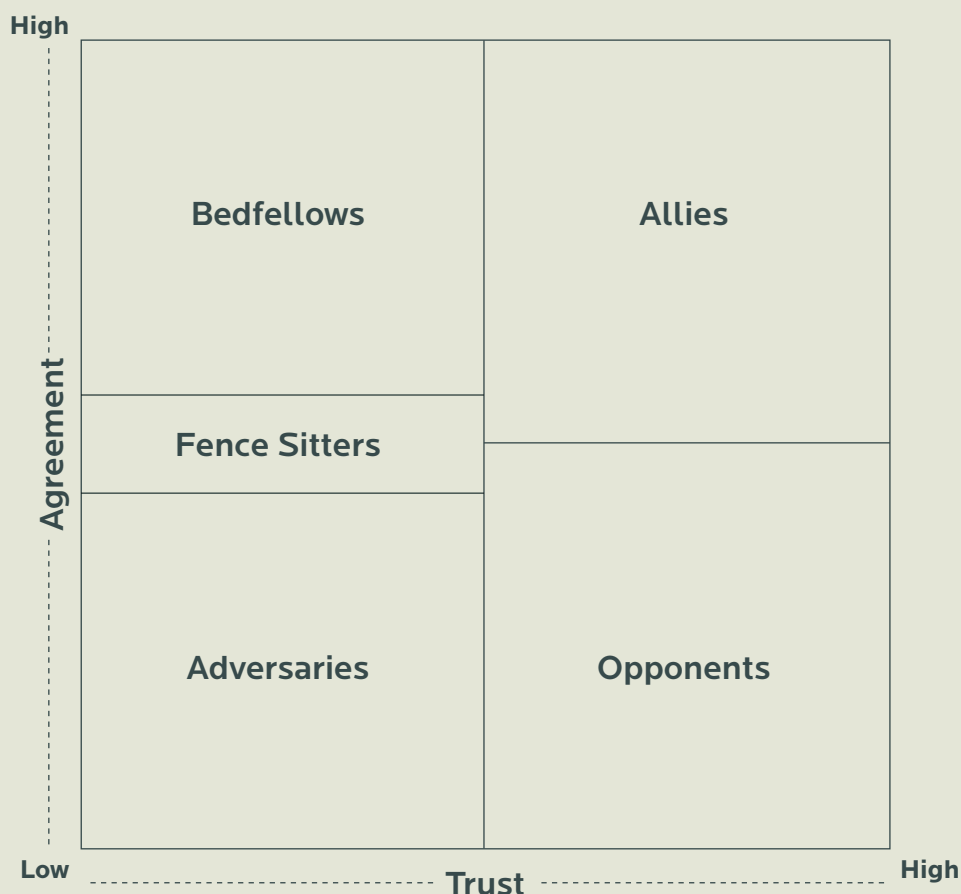
Source: Based on *The Empowered Manager* by Peter Block.

Strategic Considerations

Agreement and Trust

When trying to gain agreement from different categories of people, consider the two dimensions of influence: agreement and trust. These two variables are important when we define our relationship to others and when we try to influence them:

Level of agreement:
- Goals
- Direction
- (Big) Issues

Level of trust:
- Credibility (do they do what they say they will do?)
- Predictability (will they behave the same way?)
- Reliability (can they be counted on to do what they say?)

Categories of people

The strategic influencing grid includes five categories of people:

Ally: High Agreement/High Trust
- Satisfied stakeholders, colleagues, staff
- Supportive of your efforts
- You trust them to talk honestly about vision, goals, and strategies (yours and theirs)
- You can count on good advice from them to guide your decisions
- They can do for you what you can't do for yourself—deal with an adversary

Bedfellow: High Agreement/Low Trust
- They have hidden agendas
- They will agree with you, but may not be able to commit for political reasons
- You are never sure if they will follow through

Fence sitter: Agreement/Trust (A big question mark?)
- Never sure where they stand
- Your relationship to them is riddled with doubt
- No evident agenda, yet they won't commit

Opponent: Low Agreement /High Trust
- They bring out the best in us
- They help provide honesty to problem solving
- They offer good advice on what we need to do to build support
- They present an opportunity for dialogue with those who trust us but are dissatisfied or in disagreement

Adversary: Low Agreement/Low Trust
- Not to be confused with opponents
- May be the result of past experiences, or simply caused by any range of external factors
- Relationship continues to be adversarial after negotiations and attempts to influence them have failed.

Strategic Influencing Inventory

For your planned intervention, and with your planning group, complete a strategic influencing inventory.

Allies: _____ _____

_____ _____

Opponents: _____ _____

_____ _____

Bedfellows: _____ _____

_____ _____

Fence sitters: _____ _____

_____ _____

Adversaries: _____ _____

_____ _____

Strategic Influencing Approaches and Skills

Allies
- Use them as sounding boards, ask for advice
- Seek their support in dealing with adversaries
- Acknowledge your good relationship and your appreciation of it
- Be open, share your plans, doubts, fears, and needs

Opponents
- Tell them that the reason you value them is you know they will tell you the truth
- Be clear about your position and what you want; state your understanding of their position and what they want, recognize where you disagree
- State your intention to work together to resolve problems, reach agreements
- Work together to look at alternatives, and attempt to negotiate a resolution

Bedfellows
- Identify shared goals
- Acknowledge the strain on your relationship and the lack of trust
- Express your hopes for an improved working relationship and any changes you plan to make in your behavior/actions
- Ask them what they think would establish a better working relationship

Fence sitters
- Tell them your position and ask them where they stand
- State what you want in the way of support from them
- If they continue to be noncommittal, express your disappointment about not knowing where they stand
- Ask what it would take for them to support your ideas

Adversaries
- Acknowledge the strain in the relationship and the lack of trust
- Express your concern about what is going on and invite them to do the same
- Acknowledge how you have contributed to the problem
- Express your hopes for an improved relationship
- Make no demands on them; do not try to change them
- If you have plans to pursue your agenda despite their opposition, say so

Activity to Practice Strategic Influencing

As a planning group, review your Strategic Influencing Inventory. Pick one individual or category (e.g., city council) for your practice—for example, someone you are still trying to influence or someone with whom you want to improve or change your working relationship.

Plan for the next conversation you have with that person—how will you approach the situation, what will you say?

Who is the person (or group)?

_____

_____

_____

What category are they in? (check one)
Are they an:

☐ Ally
☐ Opponent
☐ Bedfellow
☐ Fence sitter
☐ Adversary

What outcome do you want from this conversation? Are you building trust or agreement?

_____

_____

_____

How will you start the conversation? What are the key points and statements you want to make?

_____

_____

_____

Creating Compelling Messages

Purpose: To develop message points that will resonate with each of your
target audiences

What To Do:

1. For each target audience you are trying to reach, develop a different message box. Identify the audience on the first line of the following chart.

2. Think carefully about what your audience cares about and list these values in the second section. Select the one that you think is most important to the audience. Tailor your message to this value, rather than a value you want them to have.

3. In the top section of the box, write a message point that taps into the specific value you have selected.

4. In the right section of the box, write a message that provides information that overcomes your audience's key misconception about your issue. (Avoid repeating the misconception.)

5. In the bottom section of the box, write at least one message point aimed at getting your target audience to do something—that is, make the "ask." The more doable, the better.

6. In the left section of the box, write a message point that echoes the value message (top box) and tells your audience what they will get if they do what you ask.

Who are you trying to reach with this message? (Remember to keep your audience as narrow as possible. And only select one audience at a time—different audiences need different message boxes.)

Brainstorm a list of values that your audience has. Circle the one that is most important and that you will tap into with your message.

Complete the four sections of your message box.

Value Message

Vision Message

Barrier Message

The Ask
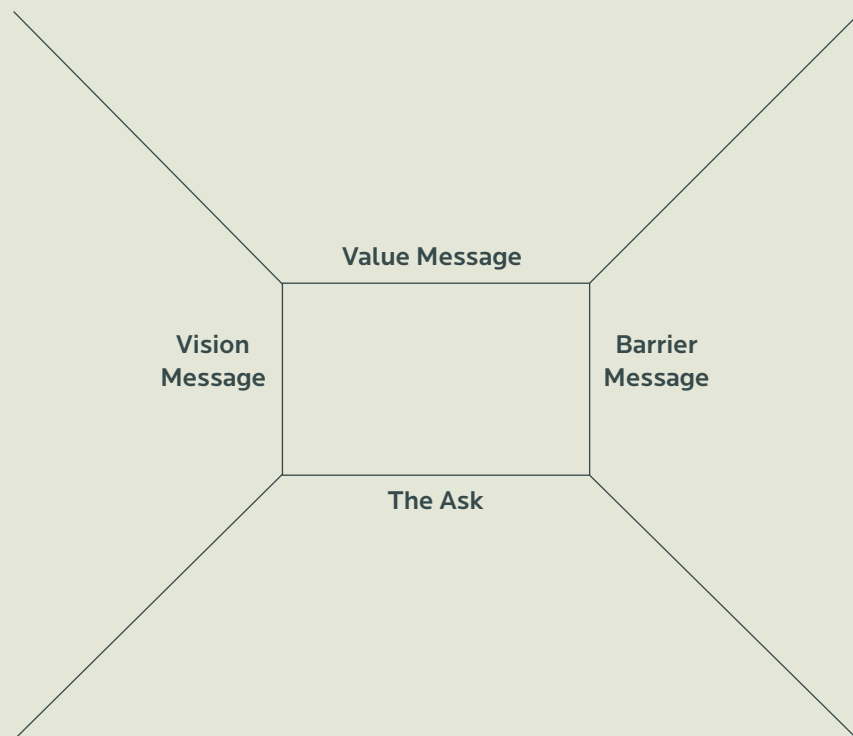
Mapping Out Your Audiences

Purpose: To map what you know about your audience and prepare you for developing effective social strategies and messages for reaching them

What To Do:

1. Based on what you have learned about your audience, you are now ready to map what you know about them. You may want to review the tools you developed in Step 11 about identifying your target audience.

2. In the first column of the following chart, describe each of your target audiences in detail. (Use additional space as needed.)

3. In column 2, identify the audience's core values and attitudes.

4. Use the following descriptions to help you complete column 3 of your audience chart. And we suggest you visit the Activation Point website to get the full scoop.

Spitfire Strategies' *Discovering the Activation Point* (spitfirestrategies.com/Tools/Discovering-the-Activation-Point.html) encourages users to identify their audience's stage of knowledge, belief, and will with regard to your chosen issue. If they don't yet know about, care about, or believe in your issue, they're in **Stage 1** (Sharing Knowledge). Your task will be to share information on the issue without overwhelming the audience, and help them develop a personal connection to the issue so they can care about it. General environmental education programs that work to improve environmental literacy and attitudes tend to be focused on audiences at this stage. For more about environmental education, see Tool #24 on page 160.

If your audience knows, cares about, and believes in the issue, but isn't quite ready to act, they're in **Stage 2** (Building Will), in which case your task is to overcome the audience's barriers to acting. You can do this by crafting actions that fit with their lifestyle, showing them people they respect and admire taking the actions, or framing your action as a social norm. People in Stage 2 need to know that the benefits of taking an action outweigh its risks or are greater than inaction.

Finally, if people are already taking some action and need encouragement to go a little further, they're in **Stage 3** (Reinforcing Action). They no longer need information; they need to be rewarded for doing the right thing. You should remind them that they've done a good thing, and celebrate your victories with the people who made it happen.

5. Complete columns 4 and 5 using the work you've done on messaging in Steps 11 and 15.

MAPPING OUT YOUR AUDIENCE

Who is your audience? Describe the audience in as much detail as possible. Use additional space as needed.	What are their core values and attitudes?	Are they ready to receive new information? See previous page for more about these terms and a link to the Activation Point.	Who do they listen to and respect? Your answer may inform your choice of messengers.	What messages would be persuasive to them?
Audience one		_____ Sharing Knowledge _____ Building Will _____ Reinforcing Action		
Audience two		_____ Sharing Knowledge _____ Building Will _____ Reinforcing Action		
Audience three		_____ Sharing Knowledge _____ Building Will _____ Reinforcing Action		
Audience four		_____ Sharing Knowledge _____ Building Will _____ Reinforcing Action		
Audience five		_____ Sharing Knowledge _____ Building Will _____ Reinforcing Action		

Cheat Sheet—Social Marketing

Purpose: To provide additional information about social marketing

A Cheat Sheet on Social Marketing

Social marketing puts the power of marketing in the hands of government agencies, nonprofit organizations, and anyone else who wants to use marketing strategies to make the world a better place. The typical goal of social marketing is to influence a behavior, such as recycling, carpooling, or improving energy efficiency in the home. In addition to the environmental realm, social marketing has most often been used by public health practitioners, who aim to improve people's habits related to health and wellbeing.

Social marketing almost always focuses on a specific audience and a specific behavior, and projects are implemented over a limited time period. This focus is what makes social marketing effective, but it also limits its applications. Social marketing is less effective for longer-term projects, issues that are best addressed through large-scale policy changes, and situations in which specific behavioral targets are not or cannot be identified. However, social marketing and other strategies, such as advocacy and education, can be combined to create changes that have both immediate impact and long term staying power.

Implementing a social marketing strategy often involves the following steps:

Formative Planning
Effective planning will help you better understand your issue and the drivers behind it. Formative planning can also help you understand your audience or audiences, and what kinds of things might motivate them.

Identify Barriers
Most environmental issues are complex and could target a number of behaviors. Water conservation, for example, can be accomplished through water-saving strategies in the home, in the yard, at commercial sites, in agricultural operations, and so on. Honing in on the behavior and audience to target often requires understanding the barriers to desired actions for that specific audience. Some barriers—such as a lack of information, a need for reminders or feedback, or encouragement through social norms—can effectively be handled through social marketing. Others, such as certain logistical or infrastructure challenges, might make it virtually impossible to promote certain behaviors without making policy changes.

Ask Three Critical Questions
According to psychologist Doug McKenzie-Mohr, designing a social marketing campaign requires that you ask three critical questions:

First, what is the potential impact of the behavior? For example, what level of reduction in greenhouse gases is achievable through shifting from one mode of transportation to another or the purchase of more-energy-efficient vehicles?

Second, what barriers exist to engaging in these activities? In deciding which behavior to promote, it is important to know what the barriers are to broad public participation in the activity.

The third question to be asked in determining which behavior(s) to promote is whether the resources exist to overcome identified barriers. An important consideration in contemplating the answer to this question is whether the behavior is one-time (e.g., purchasing an energy efficient vehicle) or repetitive (e.g., closing blinds each day before leaving for work). In general, it is more difficult to alter and maintain repetitive behavior changes than it is to bring about one-time changes in behavior . . . .

Doug McKenzie-Mohr. 2000. "Promoting Sustainable Behavior: An Introduction to Community-Based Social Marketing." *Journal of Social Issues,* Vol. 56, No. 3. pp. 543–554.

Create a Strategy

Once you've decided on a target audience and behavior (or sets of audiences and behaviors), you can use the information you've gathered through formative planning to develop a strategy. Effective campaigns use compelling messages and specific strategies that directly address the barriers to action among clearly defined audiences. The strategies and messages will depend on the issue, the audience, and the barriers. Some of the many tactics employed in social marketing include: providing information, offering incentives and rewards, asking for specific commitments, demonstrating social norms, using persuasive messengers or spokespeople, modeling new behaviors, and offering opportunities to practice new behaviors, among others.

Testing

Before the strategy is fully implemented, it should be tested with a small subset of the target audience to assess its viability and effectiveness. This step is often skipped when time and budgets are tight, but thorough testing can save money in the long run by avoiding costly mistakes and making a campaign more effective.

Implementation and Evaluation

As the campaign is deployed with the entire audience or audiences, monitoring and evaluation should be a part of the project's implementation. The feedback can help continually improve the campaign as well as inform future campaigns.

Cheat Sheet—Environmental Education

Purpose: To provide additional information about environmental education

A Cheat Sheet on Environmental Education

Environmental education aims to build an audience's knowledge, attitudes, values, and behaviors in ways that support the environment, whether in specific instances over the short term or more broadly over the long term. Using environmental education effectively requires thinking through several issues:

Is environmental education the right tool for the job?
Environmental education helps audiences learn about the environment, examine their attitudes and values, and build skills. Are these the kinds of activities that will help reach your goal? If your goal is to pass a piece of environmental legislation related to protecting waterways, then education may not be the best tool to use in the short term. However, if you are trying to help educate decision makers about an issue and to understand the pros and cons, then education is a good strategy. And if your goal is to build a long-term constituency for supporting that legislation, take on-the-ground actions to ensure that the waterway remains clean and clear of obstructions, or have an educated citizenry that votes to elect environmentally minded representatives, then education is a great tool. It helps people understand the need for the legislation, assists in implementing the work in their community, and builds support for long-term conservation of the waterway.

Long-term and short-term goals
Environmental education often helps achieve sustainable long-term changes that may not be possible with other social strategies. Social marketing, communications, and other approaches are excellent for addressing specific concerns, but their effects are usually limited to the campaign at hand. By contrast, environmental education helps learners better understand the environment and their place in it, build attitudes and values that lead them to consider impacts on the environment, and act in ways that show concern for the environment. These are attitudes, skills, and ways of thinking that can affect what people do in new and diverse situations over many years.

This is not to say that environmental education is not appropriate to use for shorter-term or more specific needs. Environmental education and other social strategies all can be used effectively for shorter-term and more specific needs, but environmental education is probably the best strategy to work over a longer-term with broader applications, transferable to a range of situations and issues.

Reaching the right audience
Environmental education can be used effectively with audiences of any age in almost any setting. As in all conservation planning, audiences should be carefully selected based on your program's goals. Environmental education programs are often grouped into two main categories: formal and informal. Formal programs are school-based (and therefore target young people), and informal programs take place anywhere but school—at zoos and aquariums, in parks or nature centers, with community groups, in people's homes, or even online. In some cases, a mix of programming in formal and informal settings is appropriate. For example, a program can target young people through formal programs at school, and include opportunities for the kids to follow up with their families in informal programs for the whole family. Research shows that, if properly designed, programs that target young people can extend to parents and families.

Pros and cons of formal and informal approaches
If you want to reach young people, reaching them in school through a formal program can be a good option. Once a school or teacher has committed to your education program, you will know your audience

and their needs—how old they are and what their information base is; you can then tailor your program accordingly. In many cases, teachers are looking for creative, interesting experiences to enrich their curriculum. But that's not always the case. Most teachers' schedules are jam packed, and it can be difficult to get traction in some schools. And the formal system is often just that: formal. You will have more success if you tie your program to the state's or district's program of studies, and that requires careful thought and expertise. The good news is that there are many reform efforts taking place across the country—including a growing number of "green school" initiatives that look at greening the curriculum, the school grounds, the facilities, and all other aspects of the school.

On the other hand, informal programs can offer more flexibility and reach a broader array of people. The topics you can cover and the ways you cover them are broader, but so is your competition. You'll have to compete with all the other things that people can do with their free time, and your challenge is to attract and retain an audience.

Most people spend more than 95 percent of their lives learning outside the formal school system.
—John Falk and Lynn D. Dierking, The 95 Percent Solution,
   The American Scientist (americanscientist.org/issues/id.87/past.aspx), Nov-Dec 2010

The experiential learning cycle
Effective environmental education programs guide learners through the experiential learning cycle, from a concrete experience (such as visiting a degraded area, planting a garden, doing an experiment, or calculating their carbon footprint), through a process of reflection and critical thinking in which they build knowledge and reflect on their attitudes and values, and then apply what they're learning in new situations. The ultimate goal is for learners to apply what they've learned to experiences in the short and long term. This is one of the distinguishing features of environmental education: while many other social strategies target one specific behavior, environmental education has the potential to address not just the issue at hand, but also affect long-term behavior through changes in people's knowledge, skills, attitudes, and values.

What environmental education isn't
High-quality environmental education programs don't tell people what to do, how to feel, or what to think about environmental issues. Like all good education, environmental education focuses on critical thinking, focusing on how to think, not what to think. The goal of any environmental education program should be to help audiences move through the experiential learning cycle, using concrete experiences to build knowledge, examine values, think critically, and reach conclusions.

If you've decided that environmental education is a strategy you'd like to employ, see the Resources section in this toolkit for a variety of resources to help you plan, execute, and evaluate your education program.

Cheat Sheet—Advocacy

Purpose: To provide additional information about advocacy as a social strategy

A Cheat Sheet on Environmental Advocacy

Unlike other social strategies, which can be more broadly applied, the aim of environmental advocacy is razor sharp: get people to support a specific view or course of action. Often the focus is political action, but advocacy can also aim to change corporate policies or activities, private citizens' actions, or other targets. Advocacy involves engaging people in civic life whether at the local, state, national, or international level.

Effectively engaging audiences in civic life and the political process uses some of the same tactics as other social strategies. It also uses some that are unique to the advocacy approach. Common advocacy tactics include:

Showing the connections
Decisions made by lawmakers in state capitols or corporate executives in board rooms can seem distant from everyday life. The first step to engaging people in civic life is often showing them how the political process affects them daily. Connecting faraway decisions with immediate implications for people's families and everyday life can be a powerful reminder that the actions and decision of politicians and businesspeople do matter.

Demonstrating the impact
Although some people don't appreciate the impact of the political process on their daily lives, others understand the impact, but doubt that they can affect it. Understandably, many people are disheartened by politics, politicians, and corporations and just don't feel like they can make a difference. Overcoming this common notion often requires compelling and concrete proof that doing what you ask—whether to vote, write a letter, or attend a meeting—will make a difference.

Letting the light shine in
Most people are easily confused and intimidated by the political process, and this discomfort can be an insurmountable barrier to action. People might understand the importance of taking action, and even want to do so, but can be so intimidated that they fail to follow through. The National Audubon Society's pamphlet "How to Be an Effective Advocate in Less than Five Minutes" (available online at: mtaudubon.org/pdf/global%20warming/EffectiveAdvocacy.pdf) helps take some of the mystery out of political advocacy by clearly explaining the different ways to engage lawmakers. For example, while people might think that only lobbyists and the politically connected can visit a lawmaker, the pamphlet explains that it's quite common and easy for any constituent to meet with a lawmaker or his or her staff. The pamphlet provides simple but detailed instructions on how to arrange a visit and what to expect. (See box for three simple things you can do to be an effective advocate.)

Making action (very) easy
Everyone is busy, so the easier you make it to do something, the more likely it is that someone will do it. With today's digital technology, it's easier than ever for people to be in touch with lawmakers. You can send your audience an email or action alert with a pre-written letter to "sign" and forward. Your audience members don't even need to know the name of their representatives. Likewise, writing letters to the editor, signing petitions, attending meetings or rallies should be as easy as possible. As with other social strategies, think through the barriers your audience might face in taking the action you seek, and work to remove as many of those barriers as possible.

Reaching people where they are

Knowing your audience will make it easier to reach them "where they are." Younger people, for example, are heavy users of digital technology, and are more likely to be engaged with social networking tools such as Facebook and Twitter. Younger people also have different ideas of what it means to be civically minded, and might not be interested in the traditional channels for getting information and taking action. Older audiences, on the other hand, might not be as reachable through digital media, and might be far more comfortable writing a letter than tweeting a friend.

Building skills and partnerships when needed

Depending on the audience and the action, it might be necessary to help people build skills for action. For example, a community group that has never been politically active but wants to lobby a representative for help in creating a community garden might require practice talking about the issue before they make their visit. Partnering with other organizations that have the skills that your group lacks can help round out a team, build skills, and produce better results.

Building a constituency for change

Concern for the environment, and the associated skills for helping protect it, doesn't develop overnight. Consider complementing short-term campaigns that focus on specific issues and actions with longer-term education strategies that help audiences better understand environmental issues, develop care and concern, and build skills for action. These audiences will be better informed, more concerned, and better equipped to act when you make a specific request.

Three Simple Actions for Change:

1. **Contact your lawmakers** (and urge them to support or defeat a specific bill)
   - Place a phone call
   - Write a letter
   - Make a personal visit

2. **Monitor and use the media** (to keep conservation issues alive in your local newspapers, magazines, blogs, and on TV and radio stations)
   - Stay informed (sign up to receive action alerts from the organizations you care about)
   - Call into local talk shows
   - Write a letter to the editor
   - Post a blog

3. **Get others involved!**
   - Send emails to friends and co-workers, as appropriate
   - Host issue parties for people who care, but might not be keeping up on issues

Cheat Sheet—Problems and Strategies

Purpose: To provide additional information about matching problems to the most effective social strategies

A Cheat Sheet on Matching Problems and Strategies

If the problem is lack of knowledge and awareness . . .

Education and communication are the best strategies to help people get the information they need to become aware of an issue, understand why it's important, and what role they might be playing in causing a problem. Educators know how to engage learners in a way that is developmentally sound, relates to how they best absorb new information, and builds on what they already know. Communicators are trained in how to divide audiences into groups with shared characteristics (called "audience segmentation"), present information, and tailor messages to an audience's values. Both educators and communicators know how to convey information using effective media and approaches. The key is knowing about how your audiences get information, what media would be most compelling, what your audience cares about, and what specific information would help.

If the problem is a need to influence values and social norms . . .

If your audience doesn't care about the issues you are working on, it will be hard for them to be motivated to act. Knowledge can influence values—especially if people do not know key pieces of information that would affect their lives. Education, communication, and social marketing can all be effective ways to influence values—especially over time.

In some cases, knowledge can influence values because information can highlight why a certain species, habitat, or human welfare issue matters. For example, understanding how wetlands can help control floods (which people often don't think about) and also protect human livelihoods may encourage people to place a greater value on wetlands.

Social norms are related to values. People may not particularly care about something themselves, but because they care about what others think of them, they might be influenced to change their behaviors to align with what they think others would do or respect. If leaders in a community or an institution value something, they may be able to influence the values and behaviors of others.

Influencing values takes time. Some experts suggest that it can take 10 to 15 years to shift societal values. Education, communication, and social marketing can be effective strategies to influence values and social norms. Social marketing usually focuses on values, norms, and behaviors in the short term and education works in both the short and long term to support and maintain those values and norms throughout a lifetime.

If there is a lack of viable options and alternatives . . .

One of the most significant barriers to behavior change is not having a good alternative to current behaviors. Even if someone knows that their current behavior is causing problems, there might not be other good choices available. Therefore, highlighting, demonstrating, and encouraging viable options can be critical to overcoming barriers. Options can include new technologies (for example, a new way to farm that can help protect edge habitat); new forms of governance, laws, policies, or thinking (such as progressive land use planning options for cities); and incentives to do or not do something (for example, tax credits for preserving intact forest land and avoiding annual timber harvesting). In many cases, new behaviors are most likely to succeed when organizations or agencies can provide incentives, help develop new skills, and enhance behavior- or issue-specific knowledge.

If there is a lack of skills . . .
Some people don't take an action because they don't know how to do it (or they think they don't know how). Education can help build skills and also the confidence to take action. For example, some people don't know how to register to vote and are embarrassed to ask. Farmers might be willing to change farming practices, but don't know what steps to take and what alternatives to pursue. Consumers might not know how to separate their trash from recyclables and, therefore, might just throw everything in one pile. Fish harvesters might know there's a different way to catch fish and shrimp that doesn't harm non-targeted species or ocean habitat, but they might not know how to do it.

If there is a lack of economic or legal incentives to conserve . . .
Economic incentives can motivate people to change their behaviors. For example, recent and historical events have demonstrated that if the price of gas gets too high, many people will drive less. The high cost is a stronger deterrent than the knowledge of how driving contributes to climate change. In many cases, new products, new markets, tax incentives, and other policy changes can provide direct benefits to people doing the new behavior.

In many cases, people can perceive that it is more "profitable" to continue unsustainable behavior because the true cost of the behavior hasn't been calculated or isn't clear. In the case of driving, adding a tax to the cost might be the incentive to drive less. Another example would be providing tax incentives for manufacturers who save energy and for consumers who ride public transportation or buy a fuel-efficient car. Policies that prohibit the use of toxic chemicals can create behavior change because fines are imminent and the impact is direct and tangible.

Laws can provide both incentives and disincentives for influencing behaviors. Fines and prison sentences, for example, can cause people not to do something that they might do without the disincentive. In some cases, though, the fine might not be high enough to dissuade people from giving up the behavior. For example, some people still hunt or collect endangered or threatened species (some species of cacti, ginseng, orchids, etc.) because they can sell the plants for a substantial sum; although collecting the plant is illegal, they perceive that the financial benefit, if they don't get caught, is worth the risk.

Legal remedies, enforcement, viable alternatives, education, and communication (for those people who might not know something is illegal) are all possible strategies.

Sources: Adapted from *Optimizing Outreach: How to Plan an Effective Strategy for Solving Management Problems by Working with Communities and Partners* by Bruce Byers, for the U.S. Fish and Wildlife Service; and *Planning a Conservation Education Program* by Diane and David Wood, U.S. Peace Corps.

Cheat Sheet—Social Media

Purpose: To provide additional information about forms of social media and how they can be used to support social strategies

A Cheat Sheet on Social Media

People	Who are you asking to do something?
Objectives	If they do it, what measurable results will you achieve?
Strategy	Describe your strategy to engage these people in achieving these objectives.
Technology	What technology are you going to use to implement this campaign?

Web Development and Online Content A Sample of Social Media Options Developed by Fission Strategy		
Maps	Google Maps	Provide specific, customized information; Show the scope of your support graphically; Embed maps into your website
Blogs	Wordpress, Blogger, Drupal	Post content in a variety of media; Single user or group blogs; Conversation through comments
Social Plugins	BuddyPress, Facebook Plugins	Let visitors see what friends are doing on your site; Port users' existing profile info from major social networks
Web Apps/APIs	Facebook Apps; Twitter, Sunlight APIs	Create special applications or games for social networks; APIs can help you add functionality or data feeds to your site
Customized Search	Google Custom Search	Makes it easier to find material; Instantly useful; Some web design experience may be needed
Campaign Microsite	Squarespace	Simplifies campaign branding; Great for collaboration with other orgs; Not always necessary—consider using an existing website
Getting to Know Your Audience		
Forms	Wufoo, Google Forms	Collect info from site visitors; Every site should collect name, email, zip from supporters; Free/cheap tools make this easy
Ideation	Ideascale, Moderator, UserVoice	Gather ideas; Website visitors rate and comment on each others' ideas; Get input from many people in a structured way
Surveys	Survey Monkey, Google Forms	Identify people's views and concerns; Need to ensure representation of sample if for decision-making

Online Messaging

E-Newsletter	Democracy in Action, Blue State Digital, Convio, Action Kit	Highly trackable, easy to grow with links to social media and website; Allows immediate action, advocacy and donation in addition to info; Average email forward rate: four more people will receive your email beyond list
Listserv/ Email Group	Yahoo! Groups, Google Groups	Quick and easy way to have discussions; People get messages straight to them; Email is 'work'; Can get frustratingly busy
E-Advocacy Systems	Democracy in Action, Convio, Action Kit	Quickly spread the word; Easy for others to use; Tricky to get set up

Engaging with Online Communities

Social Bookmarks	del.icio.us, StumbleUpon	Quick way to share knowledge and resources; Find other related information and people through tagging
Social Networks	Facebook, Myspace, LinkedIn	Connect people to people through common interests; Create new or use existing? Or both?
Social News Sharing	Democracy in Action, Convio, Action Kit	Quickly spread the word; Easy for others to use; Tricky to set up; Accessible via SMS; Target journalists, bloggers and keywords
Microblogging	Twitter, Instagram, Tumblr	Quickly access your network; Ask questions, share information; Accessible via SMS; Target journalists, bloggers and keywords
Forums	phpbb, Tangler	Threaded conversations; Easy to understand; Need moderation and facilitation

Mobile

Mobile Apps	Titanium, GameSalad	Create iPhone, Blackberry or Android application; Be in the palm of your supporters' hands, wherever they go; Best for targeting affluent demographics; Provide games, information or action
SMS/Text Messaging	Mobile Commons, TextMarks	Good for reaching younger, diverse audiences; With mobile, there is no digital divide; Mobile call-throughs and actions have higher response rate than email

Creating Multimedia Content

Image Sharing	Flickr, Picasa	Pictures tell a thousand words; Records events in a real way; Connect with others through photos
Presentation Sharing	Slideshare, Docstoc	Easy way to share stories; Embeddable in blogs, etc; Format understood by many
Video	YouTube, Vimeo	Great way to get a message across; Managers may prefer talking to camera than other mediums; Accessibility?
Podcasts	iTunes, Utterz	Cheap and easy to produce; Portable (iPods, MP3 Players, Smartphones); Similar concept to radio; Needs broadband to download?

Internal Tools

RSS Aggregation	Google Reader, Netvibes	Saves time, bringing information and people together; Great knowledge sharing
Wikis	Pbwiki, Wikispaces	Websites that anyone can edit; Quick and easy websites; Great for collaboration; Monitor for vandalism
Collaborative Documents	Google Docs, Zoho	No version control problems; Common software platform; No need for maintenance; Need to be online
Training	Democracy in Action, Convio, Action Kit	Training is needed to bring people up-to-speed with Web 2.0 Worldview; Roles and platforms need to be explained
Online Project Management	Basecamp, Huddle, Central Desktop	Collaborate on projects regardless of geography; To-do lists, discussion areas and document sharing
VOIP & Video Calls	Skype, Oovoo	Cheap way of holding long distance calls; Conference calls made easy; Can record for pod/videocast

Engaging Offline

Events	MeetUp Everywhere, Facebook, EventBrite	Great way to get large numbers of people together; Expensive and time consuming; Unconferencing a middle-way?

Crafting Your Plan

Purpose: To provide a place to summarize your project plans

What to Do:

1. You might want to use the following worksheet, or one like it, to pull together the information you've gathered and decisions you've made about your project.

2. Record the results of your prior work determining your goals, target audiences, and engagement strategies and continue to add notes as you work through Chapter 8.

3. In the first column, list each of your project strategies.

4. In column two, identify the target audience(s) for each strategy.

5. In column three, list the action or behavior change you hope to bring about in your target audience.

6. In the next column, identify the best engagement strategies for each action. You can pick as many strategies as you need. Divide into short-term strategies and long-term strategies.

7. Once you reach the action planning step, decide when to complete the planning for each chosen strategy and what additional information you need before you start implementation. Add your notes to the chart.

Gray mouse lemur   Gerry Ellis

CRAFTING YOUR PLAN

What are you trying to do? (Your strategies)	Who do you need to achieve this? (Your audience)	What do you want each target audience to do?	What engagement strategies will work in the short term and the long term?	When will you complete planning for all chosen strategies?

Results Chain

Purpose: To provide information about the results chain, a tool for explaining your theory of change

Using Results Chains

The Open Standards recommend using a tool called a "results chain" to outline your theory of change. A results chain shows how a strategy leads to a certain outcome, which can lead to another outcome, and so on. Eventually this series of activities will help achieve your conservation or human welfare targets. **(See diagram below.)**

By linking a series of causal statements in an "if . . . then" fashion, a results chain clarifies assumptions about how certain strategies contribute to reducing threats and achieving the conservation of targets. For example: "If we build the capacity of private landowners to manage their woodlots for prothonotary warblers" (strategy) and "if we provide local tax incentives for woodlot owners to keep their forests intact," (strategy), then "the amount of habitat for prothonotary warblers (target) will increase, and the population of these warblers will increase (target)."

```
  ┌───────────┐
  │ Strategy  │
  └───────────┘
        │        ┌──────────┐      ┌────────────────┐      ┌──────────────┐
        └───────▶│  Result  │ ───▶ │     Result     │ ───▶ │    Impact    │
                 └──────────┘      │ (Direct Threat)│      │  on Target   │
                  Objective        └────────────────┘      └──────────────┘
                                      Objective                  Goal
```
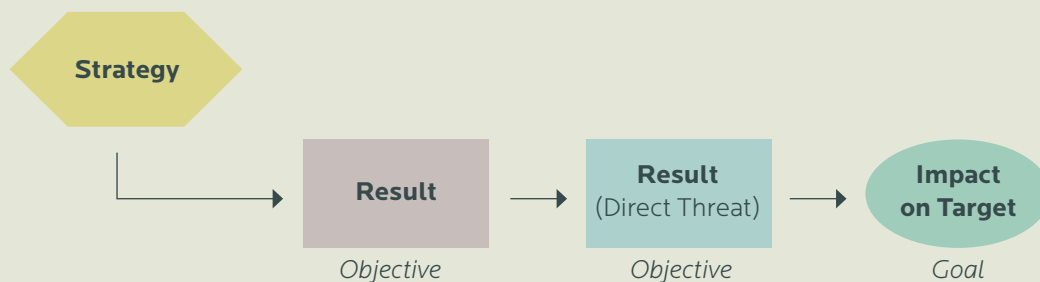
To learn more about results chains, see *Conceptualizing and Planning Conservation Projects and Programs: A Training Manual from Foundations of Success,* October 2008. (The training manual is based on the Conservation Measure Partnership's Open Standards for the Practice of Conservation.)

Theory of Change
Both Results Chain and Logic Models are tools to express the results you expect through implementation of a particular strategy (i.e., the logic of your strategy or the chain of expected results).

*The ultimate test of man's conscience may be
his willingness to sacrifice something today
for future generations whose words of thanks
will not be heard.*
—Gaylord Nelson

Example of a Results Chains

Here is a more detailed example of a results chain, with sample objectives and indicators outlined.

Objective 1:

By 2010, at least 70% of the target population in 8 major cities is supportive of existing laws to conserve Russian sturgeon

Objective 2:

By 2012, the number of kilos of Russian Caviar sold annually in these 8 cities has decreased at least 30%.

Objective 3:

By 2014, the average monthly sturgeon harvest in the Blue River watershed has decreased at least 30%.

| Media Campaign | → | Increased knowledge of importance sturgeon | → | Increased interest in sturgeon conservation | → | Consumers prefer not to eat caviar | → | Decreased demand for caviar | → | Reduction of harvesting for caviar | → | Healthy Sturgeon Population |

*Indicator:
% of target populations supportive of existing laws*

*Indicator:
% of kilos of Russian caviar sold annually in target cities*

*Indicator:
% of sturgeon harvested monthly in the Blue River watershed*

Source: Tess Present, Audubon (with examples from the Open Standards, 2010).

Inputs, Outputs, and Outcomes

Purpose: To provide examples of inputs, outputs, and outcomes, and give you ideas for your logic model

Note: Items marked with an asterisk (*) might be an input or an output, depending on the goals of the project

Inputs (resources used in the project)

Staffing:
- Number of staff involved in project
- Education level/expertise of staff
- Years of experience in conservation for all key staff members

People:
- Number of participants/volunteers involved*
- Person hours (hours worked by volunteers/participants)*
- Number of work days*
- Diversity of participants (number breakdowns and estimates ideal)*
- Number of underserved and new populations reached*
- Number of organization's members involved*

Funding:
- Matching funds
- In-kind donations

Programming:
- Number of outreach efforts
- Number of events

Context (Location of project):
- Community demographics
- Target audience (description, diversity, and so on)
- Description of outreach venue
- Threat analysis/score card (baseline)

Partnerships:
- Number of partners working on project
- Mission and description of each partner organization
- Duration of partnership
- Pre-existing or new partner
- Frequency of partnering activities
- Prior experience with partnering organization (if any)

Outputs (for both ecological and behavioral outcomes)

People:
- Number of participants/volunteers involved*
- Person hours (hours worked by volunteers/participants)*
- Number of work days*
- Diversity of participants (number breakdowns and estimates ideal)*
- Number of underserved and new populations reached*
- Number of organization's members involved*

Media/Communication:
- Number of press releases
- Type of press outlet (for example, television, newspaper, journal, national magazine, or newsletter)
- Distribution level of press outlet (size of distribution area such as national, regional, state, metropolitan area, city, or town)
- Number of interviews
- Website (number of unique visitors)

Ecological:

Habitat
- Acres restored
- Acres improved
- Vegetation planted
     - Number of trees
     - Native grasses (square feet, acres)
     - Ground cover, shrubs, woody vegetation
- Invasive species removed
     - Species
     - Volume
     - Percentage of coverage (reduction)
- Number of erosion sites removed
     - Size (acres)
     - Other specific improvements
- Monitoring
     - Size of area monitored
     - Number of species monitored
     - Number of GIS maps generated
     - Reports completed

Water
- Gallons captured or saved
- Number of cisterns
- Surface area converted from impervious surface
- Surface area of converted landscaping (square feet, square meters)
- Number of low-water landscapes/gardens installed
- Other quantifiable accomplishments

Energy
- Number of low-energy light bulbs installed
- Other quantifiable accomplishments

*Input or output depending on goals of project

Outcomes

People:
- Number of people who perform the targeted behavior
- Behavior measure (standardized instrument that assesses intention to act)
- Increased knowledge of XX issue
- More positive attitude toward XX species

Ecological:

Habitat
- See outputs (outputs list may serve as outcomes depending on scale of project and goals)
- Population trends in target species
- Threat assessment (post-program)
- Development impacts reduced (directly measured or qualitatively described)
- Threat impacts reduced (directly measured or qualitatively described)
- Number of species protected
- Diversity of species protected
- Survival rates improved
- Increased productivity (specific ecosystem services protected)
- Population sizes of target species observed
- Decrease in nest abandonment

Water
- See outputs
- Water quality improvements
- Water availability
- Policy changes

Energy
- Reduction in kilowatts used (quantified)
- Reduction in carbon emissions (quantified)
- Pounds of material recycled
- Carbon/ecological footprint
- Policy changes
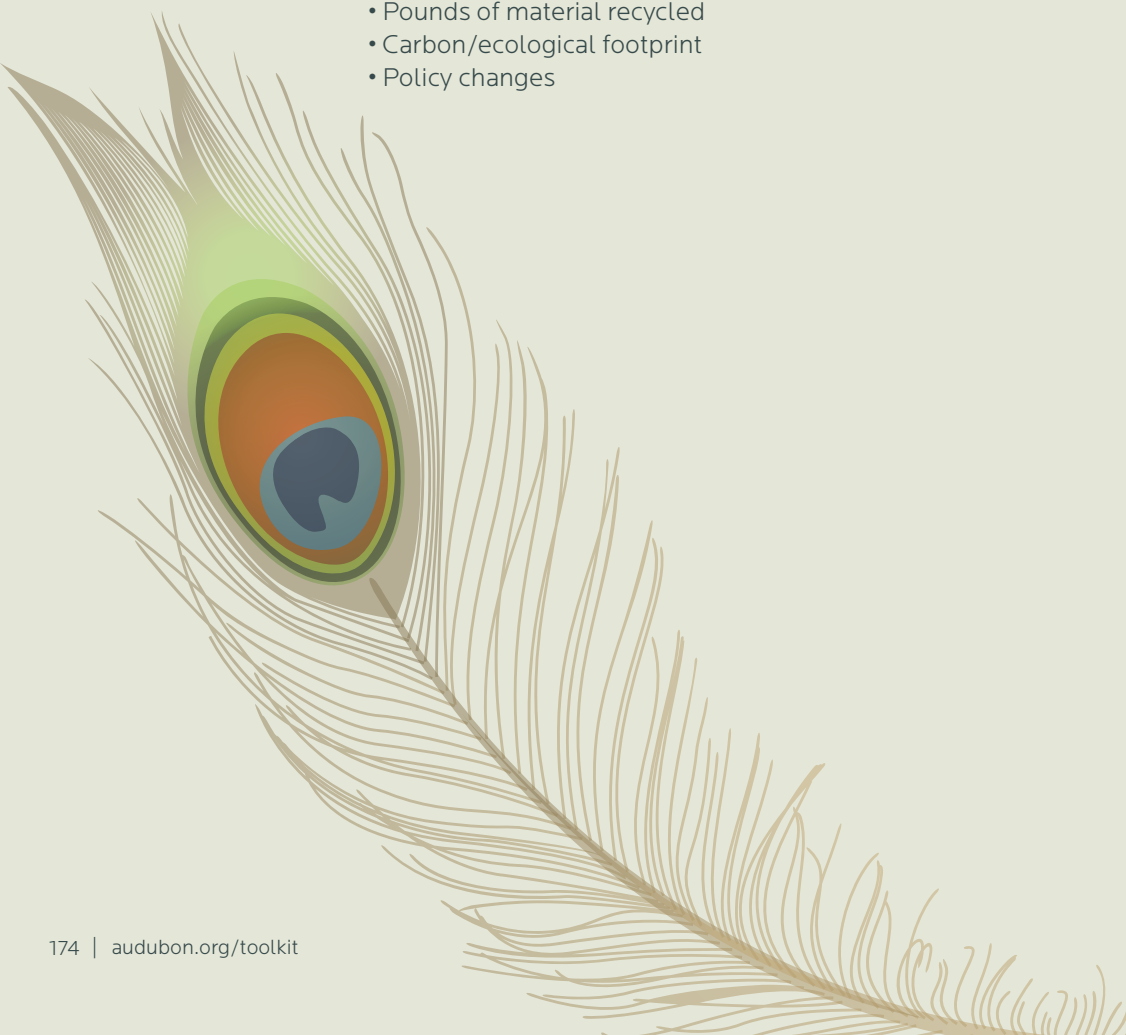
Logic Models

Purpose: To provide a template for presenting a logic model for each of your project strategies or activities.

What to Do:

1. Use the following chart to illustrate how your program strategies or activities (depending on the level you prefer to work) lead to the biodiversity and human welfare targets you seek to reach. You might want to use Tool #28 (or something similar) to help develop your logic model.

2. Write each strategy (or activity) on a separate line. Identify the threat(s) the strategy addresses.

3. In the inputs column, list the human, financial, organizational, and community resources available to the project.

4. In the outputs column, list the products and services the project will deliver, as well as the participation you anticipate (number and/or demographics). Use SMART objectives to lay the foundation for your evaluation strategy. (See page 92 for more on SMART objectives.)

5. In the outcomes column, list the changes in behavior, knowledge, skills, status, and level of functioning you expect project participants to attain as a result of your project. These are your intermediate outcomes—on your way to achieving your goals. Include both short-term (one to three years) and longer-term (four to six years) outcomes. Again, use SMART objectives to lay the foundation for your evaluation strategy.

6. Finally, in the impacts column, describe your project goals—the fundamental changes that will protect or conserve your conservation targets—that you expect will result within seven to ten years.

See the following page for the Tool #31 chart.

Project Activity or Strategy	Threat/ Conservation Issue	Inputs (resources)	Outputs SMART (what we provide, who we reach)	Outcomes SMART (intermediate outcomes)	Impacts

Building Your Evaluation Strategy

Purpose: To provide key questions to consider when developing your evaluation strategy

One of the best ways to develop your evaluation strategy is to reflect on what you're trying to do and answer some key questions related to your goals, project, and intent. Here are some sample questions to think about.

Design of the Evaluation
- What are the evaluation questions you want to answer? What are your project objectives?
- What are the evaluation criteria or indicators of success? (Check your logic models.)
- Who will be involved in the evaluation?
- How will the results from the evaluation be used?

Data Collection:
- What are the information sources?
- What data collection methods are most appropriate for the evaluation questions?
- How large a sample do you need? What sampling methods, if any, will you use?
  What's your reasoning behind that choice?
- How will the quality of the data be ensured?
- Will data collection instruments need to be pilot tested?
- When will the data be collected?

Data Analysis:
- How should the data be analyzed?
- Are computers, software, and expertise available for statistical analyses, if needed?
- What is the most useful format for the data?

Reporting and Use of Evaluation Results
- What do the findings reveal for making programmatic decisions and recommendations?
- How should the evaluation findings be presented for different groups?
- What follow-up measures can assess implementation of recommendations?

Developing An Action Plan

Purpose: To provide a template for preparing an action plan (or work plan) for your project

What To Do:

1. For each strategy identified in your logic model, complete an action plan (or work plan) that details the activities (or action steps) that comprise the strategy, the person responsible for each activity, the deadline for each activity, and any comments that will assist with implementation.

2. Consider creating a Gantt chart (a bar chart that indicates your project schedule) to accompany your action plan.

Sample Gantt Chart

TASK	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Task 1												
Task 2												
Task 3												
Task 4												

3. Use your action plan in conjunction with your monitoring plan **(Tool #35)** to manage your project.

Objectives:

Strategy:

Activities	Who	By When	Comments
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Developing a Monitoring Plan

Purpose: To provide a template for developing a monitoring plan for your project

What to Do:

1. Use your indicators of success and SMART objectives as the foundation for your monitoring plan.

2. Using your logic model and the questions in Tool #32 (or another source of guidance on evaluation), decide on the best way to measure each of your indicators of success and assess whether you are on track to achieve your SMART objectives.

3. For each indicator, complete the chart by indicating the method of monitoring, the team member responsible, the monitoring schedule, and the quantified objective you are measuring, including when you expect to be able to measure each indicator by.

4. Use your monitoring plan in conjunction with your action plan (Tool #33) to manage your project.

Lobster

MONITORING PLAN

Indicator	Method for Monitoring	Team Member Responsible	Time to be Monitored	Objective

We will be known by the tracks we leave behind.
—Dakota Proverb

Section F. **Appendix**

1 Glossary

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2 Resources

....

3 Influencing Conservation Action:
What the Research Says About Environmental
Literacy, Behavior, and Conservation

....

4 The Case Study Collection

....

5 Diversity and the Conservation Movement

....

6 What's the Story?—Why Storytelling
Matters to Conservation

*We cannot solve the problems that we have created
with the same thinking that created them.*
—Albert Einstein

Glossary

Don't use words too big for the subject. Don't say "infinitely" when you mean "very"; otherwise you'll have no word left when you want to talk about something really infinite.
—C. S. Lewis

Throughout the toolkit, you'll see words in bold that are defined in this glossary. We defined these words using the Open Standards for the Practice of Conservation, as well as accepted definitions from the fields of communication, education, social marketing, and advocacy. However, there is always debate about the exact meaning of many of the technical terms used in conservation planning. These definitions represent our attempt to synthesize and standardize the definitions of common terms used in this toolkit and to help clarify the meanings of the terminology that is specific to the social strategies.

> Note: **Blue** indicates a word whose definition has been modified from the Open Standards glossary.

Action plan—A description of a project's goals and objectives and the strategies that will be used to achieve the goals and objectives. An action plan can also include the details of implementation, including timelines, project responsibilities, and budget.

Activities—Specific actions or tasks that help achieve one or more objectives. Activities are also called actions, interventions, responses, or strategic actions. When grouped together to achieve a goal, activities become strategies.

Adaptive management—An approach to conservation planning in which testing and monitoring are integrated into a project's design and management. This kind of approach provides ongoing feedback that improves management decisions as the project progresses.

Advocacy—The promotion of a particular point of view or course of action. Advocacy can involve increasing public awareness of issues, asking people to take political actions such as writing a letter to a Congressional representative or voting for a specific candidate or proposal, or otherwise asking people to support a specific cause.

Assessment—Activities that generate information about a project, conservation target, or a particular audience. For example, if the focus of a project is a geographic area, the assessment might include an inventory of existing biodiversity in the project area. Assessments also can help describe an audience (including factors such as the audience's existing knowledge, values, and interests) or a community before a project begins.

Audience—Any group of people that is the focus of a project or program and is receiving communications, training, or education. Successful strategies require that audiences be carefully defined and targeted (see target audience).

Barrier—Any factor, whether physical or mental, that makes it difficult for a person to adopt a desired behavior. Examples of barriers include lack of skills, high costs, or physical difficulty. Most successful behavior change campaigns work to identify and remove barriers that prevent desired behavior.

Behavior—Human actions. Behaviors can be physical or mental, learned or instinctual, conscious or unconscious, habitual or planned. Behaviors can include changing a light bulb or voting for an environmentally friendly candidate. Many environmental behaviors actually include a number of several discreet behaviors grouped together. Curbside recycling, for example, involves separating trash, placing trash in the appropriate bin, and placing the bin at the curb, which are each distinct behaviors.

Capacity building—Activities designed to strengthen an organization in ways that make the organization and its partners better able to meet their goals. Capacity building activities could include skill building, networking, capital management, improvements in infrastructure, leadership development, and many others.

Civic engagement—Individual and collective actions designed to identify and address issues of public concern. Examples of civic engagement include volunteering with community organizations, voting, serving in neighborhood associations, and others. Effective civic engagement requires that citizens have the ability and opportunity to participate in civic acts.

Communications—Professional fields or activities that convey information in a variety of contexts using a wide array of tools. Journalism, broadcasting, marketing, advertising, and many other fields fall under the umbrella of communications. "Environmental communications" is a subset of the broader communications field to deliver environmental information, typically with a goal of supporting environmental sustainability. See also, strategic communications.

Contributing factor—Circumstances that help create a problem or threat to your targets, but might not be the only cause of the problem. For example, logging policies, demand for fish, and lack of access to renewable electricity can all be contributing factors. Contributing factors are sometimes referred to as root causes, although a root cause is the ultimate reason for a problem and a contributing factor might include threats that have several root causes. For example, if a threat to a species is overhunting, one contributing factor might be poor enforcement of wildlife laws. Roots causes might be the hunters' need for food or cultural norms that promote hunting.

Driver—Individual or group of people that is responsible for the root cause of a problem. Drivers typically cause problems because of their behaviors. Strategies to resolve problems can target the drivers or the people who influence the drivers.

Education—A broad discipline that aims to develop knowledge and skills among learners. The knowledge and skills to be developed vary according to the audience and the goals of the educator. Also defined as any act or experience that has a formative effect on the mind, character, or physical ability of an individual. See environmental education for the ways that education is used in the context of conservation.

Education for sustainability—A lifelong learning process that leads to an informed and involved citizenry having the creative problem-solving skills, scientific and social literacy, and commitment to engage in responsible individual and cooperative actions. These actions will help ensure an environmentally sound and economically prosperous future. Often used interchangeably with environmental education.

Environmental education—A discipline that aims to increase public awareness and knowledge about environmental issues and develop the skills necessary to make informed environmental decisions and to take responsible actions. Includes a focus on formal and informal learning.

Environmental literacy—The ability to understand an environmental problem in order to make a sound and informed decision about how to address it. "Environmentally literate" individuals have the knowledge, tools, and sensitivity to properly address an environmental problem as a citizen, and to routinely include the environment as one of the considerations in their work and daily living.

Evaluation—An assessment of the degree to which an activity or project is achieving its goals and objectives. Evaluation and monitoring are closely related, and both aim to judge the effectiveness of a particular activity or project. In general, evaluation is the broad umbrella under which activities such as monitoring and assessment fall.

Learning is an active process. We learn by doing.
Only knowledge that is used sticks in your mind.
—Dale Carnegie

Experiential learning—Acquiring knowledge and skills through direct experience. Experiential education is an approach to education that can replace or complement more traditional approaches in which student learning is more passive, such as lectures or reading assignments.

Goal—A broad statement that describes one or more impacts that a project should have on its conservation targets. While the project's vision describes the ultimate, broad aim of the project, the project's goals provide more specific statements of the impacts that are expected to help achieve the vision. Objectives, on the other hand, are more specific than goals, and describe how goals will be met. Good goals are linked to targets, impact oriented, measurable, time limited, and specific.

Indicator—A measurable factor that indicates progress toward an objective. Changes in a conservation target, a change in a threat, and changes in behavior are all examples of indicators. Good indicators are measurable, precise, consistent, and sensitive.

Kaizen—A Japanese management approach that focuses on continuous improvement in all aspects of an organization or project, involving everyone from top managers to front-line workers. Kaizen can be translated as "change for the better," and refers to incremental and continuous change, as opposed to radical change.

Logic model—A graphic that displays a project's goals, objectives, and indicators of success. Also called a "logical framework," logic models are most often presented as a matrix that displays a project's specific activities, expected outcomes, and measures of success. The aim of a logic model is to provide a shorthand display of the logic guiding the execution of a project and is a tool for explaining your theory of change.

Monitoring—The periodic collection and analysis of data to check progress toward a project's goals and objectives.

Objective—A statement that details a specific desired outcome of a project. Objectives should help a project reach its goals, which ultimately will help the project achieve its vision. A good objective is results-oriented, measurable, time-limited, specific, and practical.

Opportunity—A factor identified as part of understanding the context of your project that potentially has a positive effect on one or more targets, either directly or indirectly, and is often an entry point for conservation actions (e.g., demand for sustainably harvested timber, and established culture of conservation).

Outreach—The process of reaching audiences outside your organization with new information, skills, and opportunities. Also called "community outreach," outreach activities often involve education and communication strategies and are designed to engage key stakeholders (individuals, groups, and agencies) that are important to the success of a conservation initiative.

Practitioners—All the people involved in designing, managing, and monitoring conservation projects and programs.

Program—A group of projects that together aim to achieve a common broad vision. For example, a program with a mission to protect a broad geographic area might include projects focused on the protection of specific species or habitats within that geographic area.

Project—A set of activities guided by practitioners to achieve defined goals and objectives. Projects are the basic unit of conservation work, and, when grouped together to achieve a common broad vision, create programs. Some people use programs and projects interchangeably, since projects and programs share the same standards of practice.

Results chain—A graphic that displays the logical sequence that links a project strategy to one or more conservation targets. The steps in a results chain should be linked in an "if-then" fashion that explains the causal links between specific project activities, the expected outcomes of the activity, and the effect those outcomes should have on the conservation target.

Root cause—The ultimate reason that a certain condition or environmental problem exists. In the case of human behavior, the root cause is the reason why people engage in a particular behavior. There may be one or more root causes for a particular behavior. See contributing factor to distinguish between a root cause and a contributing factor.

Scope—The broad geographic focus of a project. The scope can also include other elements, defined by a planning group.

Social marketing—A communication and education strategy that focuses on the process of influencing human behavior on a large scale, using marketing principles for the purposes of societal benefit rather than commercial profit.

Social norm—A standard of behavior within a group. Social norms are like unwritten rules of behavior within groups, and can vary between groups. Littering may be a social norm within one group, but it may be unacceptable in other groups. Successful behavior-change campaigns often require understanding the social norms within the target audience, and demonstrating that the desired behavior is in line with the audience's social norms.

Stakeholder—Any individual, group, or institution that has a vested interest in the natural resources of the project area or may be affected by project activities. Stakeholders are all the people or groups whose participation and support are critical to a project's success.

Strategic communications—A focused approach to delivering information in which a targeted message is delivered through the appropriate media to reach a specific audience when they are most likely to be receptive to the information. To achieve social change objectives, this kind of approach often involves two-way communication and dialogue, messaging and positioning, focused campaigns, use of the media, and other strategies.

Strategic plan—The overall plan for a project that describes the project's scope, vision, targets, goals, and objectives. The plan should also detail the strategies to be used to achieve the objectives, the practitioners and stakeholders who will be involved, plans for monitoring and evaluation, and operational considerations such as funding, risk assessment, project timing, and others. A strategic plan is sometimes divided into strategic goals and operational goals, as well as component parts that include an action plan, monitoring plan, and an operational plan.

Strategy—A group of actions with a common focus that work together to reduce threats, capitalize on opportunities, or restore natural systems and protect human welfare. Strategies include one or more activities and are designed to achieve specific objectives and goals. A good strategy is linked, focused, feasible, and appropriate.

Target—One or more elements of biodiversity or human welfare at a project site. **Biodiversity targets** could be a species, habitat, ecological system, or ecological process that a project has chosen to focus on. If a project is focused on a particular geographic area or ecological system, the targets should represent the full suite of biodiversity in the area. For example, a project focused on a particular riparian habitat might include targets such as key species of trees, grasses, mammals, fish, insects, and amphibians. **Human welfare targets** focus on the impact of conservation on the health or vitality of people or their future. For example, a project could be focused on improving water quality to provide a community with a clean, healthy supply of drinking water or protecting sustainable fish populations.

I'm writing a book. I've got the page numbers done.
—Steven Wright

Target audience—A focused group of individuals that communication or education activities will be delivered to. The target audience should be carefully defined by analyzing the drivers of threats to a target and identifying the groups of people most responsible for those threats. The target audience might be the individuals who are causing the problems or individuals who can influence them. Target audiences can be further divided according to demographic or psychological criteria to create strategies that are most appropriate for each target audience.

Theory of change—A description of the process of planned social change, from the assumptions that guide its design to the long-term goals it seeks to achieve. A logic model is a tool to help articulate a project's theory of change.

Threat—A human activity that directly or indirectly degrades a target. A project typically identifies stakeholders that are responsible for specific threats. Some sources also differentiate between direct threats and indirect threats (contributing factors and root causes are indirect threats).

Vision—A description of the ultimate condition that a project is working to achieve.

The most erroneous stories are those we think we know best—and therefore never scrutinize or question.
—Stephen Jay Gould

Resources

Education is for improving the lives of others and for leaving your community and world better than you found it.
—Marian Wright Edelman

The following resources can help you plan, design, evaluate, and implement a conservation project. This list includes many of our favorites for learning more about the topics covered in the toolkit. We know there are dozens more. Let us know of resources you'd suggest we add and why, and we'll consider them for the online version.

Resources

Table of Contents

Civic Engagement

Access, Analyze, Act: A Blueprint for 21st Century Civic Engagement
http://www.pbs.org/teachers/vote2008/blueprint/

This online curriculum for middle and high school students was developed by PBS and The Media Education Lab. The materials are designed to leverage the power of social media to help students better understand and participate in the political process, especially during elections. The materials cover concepts such as social media, media literacy, and action skills.

The Biodiversity Debate: Exploring the Issue (Environmental Issues Forums)
http://www.acornnaturalists.com/store/BIODIVERSITY-DEBATE-THE-Exploring-the-Issue-Environmental-Issues-Forums-P2667C0.aspx

Environmental Issues Forums offer an opportunity to bring citizens together to discuss local environmental issues in a constructive, nonpartisan setting. This guide provides background information and step-by-step guidance to help you create an Environmental Issues Forum, with a goal of finding solutions at the community level.

The Center for Information and Research on Civic Learning and Engagement (CIRCLE)
http://www.civicyouth.org/

Based at the College of Citizenship and Public Service at Tufts University, CIRCLE conducts research on civic and political engagement among young Americans. The center's website includes a wealth of information on youth and civic engagement, including research and tools related to service learning, youth voting, civic education, social networks, and trends by race, ethnicity, and gender.

The Civic Mission of Schools
http://www.civicmissionofschools.org/site/campaign/cms_report.html

This report makes the case for the need to include civic education in American schools. It reviews current trends in American political involvement, and offers recommendations for effective strategies in civic education. The information in the report is especially relevant for environmental educators working to help students become more engaged in civic life.

Collaborative Leadership: How Citizens and Civic Leaders Can Make a Difference
http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787900036.html

Authors David Chrislip and Carl Larson draw on their research in communities across the country to provide this usable reference for understanding why and how to better involve citizens in developing public policy. The book covers topics including the need for better collaboration among citizens and policy makers, challenges to traditional leadership, strategies for effective collaboration (including factors such as good timing and a clear need, strong stakeholder groups, openness of the program, and high-level commitments, among others), producing effective results, principles of collaborative leadership, and examples of effective civic action.

Communicating Citizenship Online: Models of Civic Learning in the Youth Web Sphere
http://www.engagedyouth.org/research/reports/#comcit

This report from the Civic Learning Online Project examines the changing styles of citizenship among America's youth. The report finds that most young people prefer participatory approaches to citizenship, which are facilitated through digital media. The authors analyzed some of the most popular youth civic engagement websites, and found that youth communities that are available only through online venues offer the broadest range of civic learning opportunities. On the other hand, most conventional civic organizations have not embraced the potential of digital media for civic education. The research has important implications for conventional organizations that want to better use digital media to engage young people in civic life.

Creative Community Builder's Handbook: How to Transform Communities Using Local Assets, Arts, and Culture
http://www.fieldstonealliance.org/productdetails.cfm?PC=63

Although this book is focused on ways to use arts and culture to transform communities, the lessons offered from author Tom Borrup apply to anyone who wants to organize and build communities for social causes. The book includes strategies for community building, including assessing your goals, recruiting partners, mapping assets, creating a vision and strategies, crafting a plan, securing funding, and attracting media attention.

Educating about Public Issues: Lessons from Eleven Innovative Public Policy Education Projects
http://www.eric.ed.gov/ERICWebPortal/search/detailmini.jsp?_nfpb=true&_&ERICExtSearch_SearchValue_0=ED378398&ERICExtSearch_SearchType_0=no&accno=ED378398

This report synthesizes key lessons learned from the implementation of eleven education projects funded by the W.K. Kellogg Foundation. The report includes illustrative vignettes and case studies. Some of the lessons learned include the importance of coalition building, education and dialogue, empowerment, media engagement, evaluation, and capacity building. The report also discusses the challenges of distinguishing between education and advocacy.

Learn and Serve: America's National Service-Learning Clearinghouse
http://www.servicelearning.org/

Learn and Serve is an online clearinghouse of information and resources on service learning for community-based organizations, higher education, K–12 education providers, and Native American tribes. The site offers publications and research, curriculum materials, opportunities to connect through social media and email discussion lists, and more.

Moved to Action: Motivation, Participation, and Inequality in American Politics
http://www.sup.org/book.cgi?id=17072

In this book, political scientist Hahrie Han discusses the pathways to political participation, and argues that organizations that can make clear connections between issues and the things people care most about in their daily lives will be the most successful at motivating participation in the political process.

National Park Service Case Studies in Civic Engagement
http://www.nps.gov/civic/casestudies/index.html

This site includes links to case studies from a variety of national parks that have used civic engagement to help create, renovate, or manage parks for natural and historic preservation. The case studies offer a range of examples and perspectives on how the public can be involved, and how their input can help manage public resources.

The Virtual Activist Training Course
http://www.netaction.org/training/

This free online course was developed by NetAction, a California nonprofit that helps organizations use the Internet for grassroots organizing. The training includes topics such as using email for outreach, organizing, and advocacy; web-based outreach tools; membership and fundraising; privacy, security, and copyright issues; and technology planning. The course also includes reading materials for further information and downloadable quick-reference checklists.

Good communication is as stimulating as black coffee, and just as hard to sleep after.
—Anne Morrow Lindbergh

Communication

The Behavior Grid
http://www.behaviorgrid.org/

Developed by Stanford researcher BJ Fogg, the behavior grid is an easy-to-use online framework that describes 15 ways that behavior can change, depending on the type of behavior and the span of time over which the change will take place. The site also includes examples, tips for clarifying target behaviors, and a link to the newly developed Behavior Wizard, which walks users through the process of changing behaviors.

Communicating Nature: How We Create and Understand Environmental Messages
http://islandpress.org/bookstore/details0ca2.html?prod_id=1145

Julia Corbett, professor in the Department of Communications at the University of Utah, offers a broad overview of environmental communications in this book that covers topics spanning environmental attitudes, behavior, and communicating for social change.

Communication Skills for Conservation Professionals
http://islandpress.org/bookstore/details1010.html?prod_id=1775

In this book, University of Florida professor Susan Jacobson describes key elements of effective communications, including how to plan a communications campaign, use research to better understand the audience, employ mass media to spread a message, and use evaluation to assess success and improve a campaign.

Creating a Climate for Change: Communicating Climate Change and Facilitating Social Change
http://www.cambridge.org/uk/catalogue/catalogue.asp?isbn=0521869234

Edited by Susanne Moser and Lisa Dilling, this book covers diverse angles on the challenge of using communications, outreach, and education to address the urgent problem of climate change. Although the chapters focus on climate change, the lessons are applicable to a variety of environmental issues, topics, and disciplines.

Discovering the Activation Point™: Smart Strategies for Making People Act
http://www.activationpoint.org/

Created by Spitfire Strategies for the Communications Leadership Institute, this resource is designed to help nonprofit organizations move people to action. The guide describes how to target an audience, define the goals and scope of a campaign, launch a campaign, and more.

Environmental Communication in the Public Sphere
http://www.sagepub.com/booksProdDesc.nav?prodId=Book233500&

This textbook provides an overview of how communications can be used to address environmental issues. Robert Cox, three-time president of the Sierra Club, draws on decades of experience to pull together case studies and background on a range of topics, including public participation, conflict resolution, media, risk communication, advocacy, and more.

Environmental Communication Network
http://www.esf.edu/ecn/

The Environmental Communication Network's site focuses on topics of interest to environmental communicators. The site provides information about and links to resources, films, courses and programs in environmental communications, and much more. The ECN also publishes a blog and maintains a Facebook page.

Immunity to Change: How to Overcome It and Unlock
the Potential in Yourself and Your Organization
http://hbr.org/product/immunity-to-change-how-to-overcome-it-and-unlock-t/an/1736-HBK-ENG

Authors Robert Kegan and Lisa Lahey uncover the reasons why the status quo is so powerful, and why changing it can be so difficult. A case in point: Doctors have found that even when they tell patients with life-threatening heart conditions that they will die if they don't change their habits, only one in seven patients makes the necessary changes. The authors explain our natural immunity to change, and offer strategies for breaking through our barriers, either individually or organizationally.

Influence: The Psychology of Persuasion
http://www.harpercollins.com/books/influence-Robert-B-Cialdini-
PhD?isbn=9780061241895&HCHP=TB_influence

Researcher Robert Cialdini describes the psychological science of persuasion in this easy-to-read book. Based on his and others' research, Cialdini describes six principles of persuasion: reciprocity, scarcity, liking, authority, social proof, and commitment/consistency. Though not written specifically for environmental professionals, the book is useful as a conservation tool because it describes universal human tendencies, and how to ethically employ them to persuade an audience.

Made to Stick: Why Some Ideas Survive and Others Die
http://www.madetostick.com/

Brothers Chip and Dan Heath build on a range of research to explore why some ideas stick and others fade. The book draws from successes and failures of scientists, educators, business people, and others. The authors reveal that "sticky" ideas are simple, unexpected, concrete, credible, emotional, and incorporate stories.

The Psychology of Climate Change Communication: A Guide for Scientists,
Journalists, Educators, Political Aides, and the Interested Public
http://www.cred.columbia.edu/guide/index.html

Published by Columbia University's Center for Research on Environmental Decisions, this guide summarizes what researchers know to be the most effective ways to communicate about climate change. Topics include knowing your audience and getting their attention, translating scientific data, addressing uncertainties, tapping into social identities, encouraging group participation, and making behavior change easier. This is a useful tool for anyone working to address climate change as well as other environmental challenges. You can click on the guide's different sections, download the entire PDF, or request a hard copy.

A Scientist's Guide to Talking with the Media:
Practical Advice from the Union of Concerned Scientists
http://www.ucsusa.org/publications/scientist-media-guide.html

Richard Hayes and Daniel Grossman provide scientists with practical advice for effectively using the media to talk about research. The authors (one a seasoned media director from the Union of Concerned Scientists and the other an experienced national journalist) describe how to simplify messages, craft sound bites, prepare for interviews, and more. They provide helpful advice for communicating complex scientific information accurately.

Smart Chart™ 3.0
http://www.smartchart.org/

Another resource from Spitfire Strategies, the Smart Chart is an online tool designed to help nonprofits create more effective communications campaigns. This tool uses a step-by-step process to walk users through the process of creating a strategic communication plan and implementing a campaign.

Switch: How to Change Things When Change Is Hard by Chip and Dan Heath
http://heathbrothers.com/switch/

Another book from Chip and Dan Heath (see above), *Switch* addresses why it can be so difficult to make lasting changes in behavior, whether we want to make those changes to sell a product, reduce our waistline, or change the world. The Heath brothers explain how effective behavior-change campaigns balance the tension between people's rational and emotional minds.

We need to include everyone; it's the only way we can be a neighborhood.
—Officer Jennifer Moulthrop

Community Assessment

Community Assessment Tools
http://www.rotary.org/ridocuments/en_pdf/605c_en.pdf

This Rotary International resource was developed to help Rotary Clubs better understand their communities in order to more effectively plan service projects. Many of the tools discussed—surveys, asset inventory, community mapping, daily activities schedule, seasonal calendars, community cafés, focus groups, and panel discussions—are also useful in the conservation context.

Community Culture and the Environment: A Guide to Understanding Sense of Place
http://www.epa.gov/care/library/community_culture.pdf

This guide from the U.S. EPA includes a toolkit to help readers better develop community-based Conservation projects. In addition to introductory materials on audience targeting, communication, environmental education, planning, and more, the guide includes an outline of elements critical to conducting a community assessment project. Highlighted steps include pre-project planning, defining goals and community, identifying community characteristics, assessment methods, and tips for analyzing results. The guide concludes with a series of case studies of community projects.

Old Woman Creek Social Assessment
http://www.csc.noaa.gov/cms/human_dimensions/OldWomanCreekOHNationalEstuarineResearchReserveCommunityCharacterization.pdf

This report from the National Oceanic and Atmospheric Association (NOAA) Coastal Services Center provides a case study in community assessment. A variety of social assessment tools were used to analyze Old Woman Creek Reserve and surrounding areas, including a general community characterization, focus groups, and mapping exercises.

Preparing for a Collaborative Community Assessment
http://www.extension.iastate.edu/Publications/CRD334.pdf

This short brochure from Iowa State University Extension offers an overview of community assessment. The brochure explains what community assessments are and why they are used, the characteristics of successful community assessments, the steps involved in conducting a community assessment, and how to use the results.

Using Rapid Appraisal Methods
http://pdf.usaid.gov/pdf_docs/PNABY209.pdf

This USAID publication offers an overview of rapid appraisal methods, which can be used to quickly gather information for a variety of purposes, including community assessment. The publication discusses the strengths and limitations of this approach, when to use it, and common methods.

Conservation Planning

The whole purpose of education is to turn mirrors into windows.
—Sydney J. Harris

Conservation by Design Gateway
http://www.conserveonline.org/workspaces/cbdgateway

Created and hosted by The Nature Conservancy, the Conservation by Design Gateway connects the global conservation community with tools and resources they can use and share as they undergo the conservation planning process. From goal setting to strategy development, implementation and monitoring, this online tool has resources, checklists, case studies, and more. And it also allows users to discuss and share ideas and resources as they work.

The ConsNet Portal 1.0
http://consnet.org/primer/

The ConsNet Systematic Conservation Planning Primer is a project of the Biodiversity and Biocultural Conservation Laboratory at the University of Texas at Austin. The site offers software planning tools, case studies, data sets, and links to databases. The site also includes a tutorial with assessment tools that takes users through eleven stages of conservation planning.

Delivering Large-Scale Conservation Results: WWF Program Management Standards for Ecoregions and Large Programs
http://panda.org/standards/field_guide

Developed as a field guide for WWF professionals working within large conservation programs, this guide provides an overview for planning a large-scale conservation program. Much of the information can be applied to smaller-scale initiatives as well. In addition to a downloadable PDF, this publication is available online at: http://www.panda.org/standards/

Developing and Implementing an Adaptive Conservation Strategy: A Guide for Improving Adaptive Management and Sharing the Learning Among Conservation Practitioners
http://www.prbo.org/cms/docs/consplans/ACSGUIDEweb.pdf

PRBO Conservation Science (PRBO) is a nonprofit organization founded in 1965 at Point Reyes Bird Observatory. According to PRBO, this guide is "based on the collective experience of conservation scientists and land and ocean managers working in California and other places in the American West over the last 30 years." The guide provides an overview of the adaptive management process, case studies, and tips for making a program more successful.

Ecosystem-Based Management Tools Network
http://www.ebmtools.org/

The Ecosystem-Based Management (EBM) Tools Network brings professionals together to promote the use of EBM in coastal and marine environments and the watersheds that affect them. The site includes a searchable database of tools for decision support, modeling and analysis, data collection and management, outreach, project management, and more.

Miradi Software

http://www.conservationmeasures.org/initiatives/miradi-software

Developed to help practitioners use the Open Standards for the Practice of Conservation (see below), this proprietary software guides users through the conservation planning process with a variety of tools. The software helps define a project's scope and goals, develop work plans and budgets, select monitoring indicators, share results, and more.

Open Standards for the Practice of Conservation

http://www.conservationmeasures.org/initiatives/standards-for-project-management

The Conservation Measures Partnership developed the "Open Standards" to combine best practices in conservation planning concepts, approaches, and terminology with the aim of improving conservation project design, management, and monitoring. The standards guide practitioners through the stages and steps of conservation planning.

In its best moments, America sings a song of inclusion, and, as one, we rock 'n' roll."
—Daryl H. Miller

Diversity

Alaska Native Knowledge Network

www.ankn.uaf.edu/about.html

The Alaska Native Knowledge Network (ANKN) collects and exchanges information on Alaska Native knowledge systems. According to ANKN, the organization was established "to assist Native people, government agencies, educators and the general public in gaining access to the knowledge base that Alaska Natives have acquired through cumulative experience over millennia." The website includes links to information on cultural resources and knowledge systems (including traditional ecological knowledge and ecology, environment, and education), links to information about other indigenous groups, and a wealth of education resources.

Broadening the Base through Open Space: Addressing Demographic Trends by Saving Land and Serving People

http://www.environment.yale.edu/publication-series/environmental_politics_and_management/5864

In these conference proceedings, editors Darcy Newsome and Bradford Gentry make the case that "broadening the base of support for land conservation—across ages, ethnic groups and income—is the key to the future of open space in the US." The book includes sections that cover topics such as the need for broadening the base of support for land conservation, how the conservation movement can build diverse coalitions, capturing opportunities for using land to engage with new communities, addressing the risks of engaging new communities, and more. Each of the book's sections is available for download as a PDF.

Building Capacity Through Diversity: Towards a More Diverse and Just Environmental Movement in Michigan

www.environmentaldiversity.org/documents/MIBuildingCapacityReport.pdf

Although it's focused on a specific program in Michigan, this report from the Arab Community Center for Economic and Social Services (ACCESS) provides a useful case study in building diversity. According to the report's introduction, "ACCESS created this report to share our journey as we developed and implemented the Building Capacity through Diversity project, and to highlight the stories and experiences of our participants. It is one model, not the prescription, to carry out this important mission of being more diverse and inclusive in our work. We hope this report will provide inspiration, and serve as a resource for environmental organizations and community activists that want to create a stronger, more equitable movement for environmental protection and social change."

Building Relationships with Communities of Color: The Western States Diversity Project
http://www.environmentaldiversity.org/documents/TNCDiversityStudy.pdf

Prepared for the Nature Conservancy by Pyramid Communications, this report represents the first steps in developing a diversity campaign in the western states. While the report is specific to both the Nature Conservancy and the three focus states—Colorado, New Mexico, and Washington—the report may be helpful to groups in a similar planning stage. The report details some of the important background information to consider, and includes general guidance on successful outreach campaigns.

Center for Diversity and the Environment
www.environmentaldiversity.org

The Center for Diversity and the Environment works with environmental organizations to strategically diversify their operations. The group provides equity audits of organizations and institutions, technical assistance in diversity efforts, and trainings, workshops, and forums. Their website includes one of the most comprehensive lists of resources for information on increasing diversity within the environmental movement.

Center for Whole Communities
www.wholecommunities.org

The Center for Whole Communities works to reconnect people—"regardless of income, gender, race, ethnicity, or background"—to the places where they live. The group offers retreats and workshops for environmental professionals, and can deliver talks at meetings. Their website includes links to a variety of resources related to building whole communities.

Diversifying the Conservation Movement: A Report on the Future of Land Conservation in America
www.environmentaldiversity.org/documents/diversifying_conservation.pdf

In this special report from the Land Trust Alliance, authors Marcelo Bonta and Charles Jordan discuss some of the challenges and opportunities in increasing diversity in the conservation movement. The report includes specific recommendations for addressing the diversity crisis, including recommendations for both organizations and individuals.

Diversity and the Future of the U.S. Environmental Movement
http://environment.yale.edu/news/5175

In this collection of essays from environmental leaders and diversity experts, editor Emily Enderle lays out a set of powerful arguments for increasing diversity in conservation organizations. The book includes diverse perspectives on the issue of diversity, and concludes with next steps for achieving diversity and inclusivity in the environmental movement.

Diversity Matters
www.diversity-matters.org

Diversity Matters helps organizations working for environmental and social change to put the power of diversity and inclusion to work for their organizations. The group offers trainings, consulting services, leadership development, and other services to help build diversity and transform organizations.

Everybody's Movement: Environmental Justice and Climate Change
http://envsc.org/esc-publications/ESC%20everybody%20s%20movement.pdf

This report by Angela Park, published by the Environmental Support Center, examines the ways in which the environmental justice movement can support work to address global climate change. New constituencies are not often tapped in climate change programs, but the report argues that "significant data tell us those untapped constituencies are more likely to support strong climate policies than those already engaged. And those suffering the most from current energy and environmental policies have the most to gain. There is a compelling argument for rethinking who is worthy of engagement." The report includes discussions of barriers to inclusion and strategies to move forward.

Green for All

http://greenforall.org

Green for All is an organization with a mission to use green jobs to lift Americans out of poverty. According to the group, "we work in collaboration with the business, government, labor, and grassroots communities to create and implement programs that increase quality jobs and opportunities in green industry—all while holding the most vulnerable people at the center of our agenda." The group's website includes case studies and resources for green entrepreneurs, educators, organizers and others.

Making EE Relevant to Culturally Diverse Audiences

www.uwsp.edu/natres/eetap/makeEErelevant.aspx

In this online course offered by the University of Wisconsin–Stevens Point, students (who may take the course for credit or as a non-credit workshop) learn how to better include diverse audiences in their environmental education programs. The course helps students understand the interests of culturally diverse audiences, assess barriers to participation among diverse audiences, and build partnerships with members of new audiences.

Multicultural Environmental Leadership Development Initiative (MELDI)

www.meldi.snre.umich.edu/

Housed at the University of Michigan's School of Natural Resources and Environment, MELDI aims to increase diversity in environmental organizations as well as the broader environmental movement by promoting greater diversity in leadership in the environmental field. To this end, MELDI's faculty and staff conduct research on environmental workforce dynamics and provide resources to help students, activists, and environmental professionals develop environmental careers and leadership skills.

Still Developing the Toolbox: Making EE Relevant for Culturally Diverse Groups

http://cms.eetap.org/repository/moderncms_documents/Still_Developing_Toolbox.1.1.1.pdf

This article by Joanne Lozar Glenn, published by the Environmental Education and Training Partnership, provides an overview of current efforts to promote diversity in environmental education. The article provides several examples of different approaches organizations have taken to increasing diversity in education programs. The article concludes with a list of resources to learn more.

> *To add a library to a house is to give that house a soul.*
> —Cicero

Environmental Education

Conservation Education and Outreach Techniques

http://www.naaee.org/publications/publications-descriptions

Susan Jacobson, Mallory McDuff, and Martha Monroe explain the theory and practice of creating effective conservation education and outreach programs. The book covers techniques for enhancing school resources, marketing environmental messages, using mass media, developing partnerships for conservation, and designing on-site programs for natural areas and community centers. Case studies from around the world help demonstrate how these techniques can be applied.

Education for Sustainability Curriculum Design Workbook

http://www.cloudinstitute.org

This resource focuses on how to design and deliver education programming focused on sustainability. Sections include The Cloud Institute Framework, Curriculum Design Worksheets, Curriculum Design Templates, Assessment Tools, Exemplars, and Additional Resources. The Cloud Institute has many additional resources focused on topics including economics, hunger, leadership, and consumption.

EE-Linked: Environmental Education on the Internet
http://eelinked.naaee.net/

EE-Linked is a site hosted by the North American Association for Environmental Education (NAAEE). The site contains a wide variety of networking functions and resources for environmental educators, including teacher resources, student programs, links to blogs and forums, grant and job opportunities, and more.

Environmental Decision Making, Science, and Technology
http://telstar.ote.cmu.edu/environ/m1/s1/index.shtml

Carnegie Mellon University hosts this site, which provides an overview of teaching environmental literacy. Developed based on years of experience teaching about environmental literacy, the site not only covers what environmental literacy is, but also offers a variety of projects and exercises to help build environmental literacy.

Environmental Education and Communication for a Sustainable World: Handbook for International Practitioners
http://www.rmportal.net/library/content/tools/biodiversity-conservation-tools/putting-conservation-in-context-cd/communication-and-education-approaches-resourses/Environmental-Education-Communication-for-a-Sustainable-World-Handbook-for-International-Practitioners/view

Edited by Brian Day and Martha Monroe, this handbook helps practitioners plan, implement, and evaluate communications and education campaigns. The guide covers topics including behavior change, participation, gender, formative research and pretesting, evaluation, and more. The handbook also provides case studies from around the globe that help demonstrate how education and communications can support sustainability.

Environmental Education in the Schools: Creating a Program That Works!
http://multimedia.peacecorps.gov/multimedia/pdf/library/M0044_enveduc.pdf

Judy Braus and David Wood created this manual for Peace Corps volunteers interested in using environmental education to further their conservation goals. This book includes background on environmental education, teaching strategies, evaluation tips, resources, and dozens of activities and examples.

Environmental Protection Agency's Office of Environmental Education
http://www.epa.gov/education/

The EPA's Office of Environmental Education is a national leader in supporting environmental education. The site reflects the office's broad support of the field, providing information about and links to funding opportunities, environmental education research, teaching resources, publications, and more.

Guidelines for Excellence in Environmental Education
http://www.naaee.org/publications/guidelines-for-excellence

The National Project for Excellence in Environmental Education has created a series of guidelines that set the standards for high-quality environmental education. Guidelines are available on standards for environmental education materials, training for environmental educators, and design of nonformal environmental education programs. The series also includes guidelines that define what K–12 students should know and be able to do as a result of participating in high-quality environmental education.

The Handbook of Sustainability Literacy Skills for a Changing World
http://www.sustainability-literacy.org/thepaperback.html

Edited by Arran Stibbe, this handbook focuses on how to build the skills needed to respond to the threats of climate change, peak oil, resource depletion, economic uncertainty, and energy insecurity demands. Leading sustainability educators are joined by permaculturists, literary critics, ecologists, artists, journalists, engineers, and philosophers in exploring the skills needed in the twenty-first century, including creativity, ingenuity, and new ways of thinking to reinvent self and society. Contributors include John Naish, Satish Kumar, Patrick Whitefield, John Blewitt, Stephan Harding, and Stephen Sterling.

InformalScience.org
http://informalscience.org/

A project of the University of Pittsburgh's Center for Learning in Out-of-School Environments (UP-CLOSE) at the Learning Research and Development Center, this site provides projects, research, evaluation information, and more to informal science educators. The site contains links to recent research, reports, and resources, and includes professional networking functions.

National Environmental Education Week
http://eeweek.org/

National Environmental Education Week is a project of the National Environmental Education Foundation (NEEF). The event aims to increase the environmental literacy of K–12 students. The site contains information on the project partners and resources for teaching about the environment.

Surrounded by Science: Learning Science in Informal Environments
http://www.nap.edu/catalog.php?record_id=12614#description

This book puts research into action with tools for informal science educators. It was developed as a companion to the National Research Council study titled Learning Science in Informal Environments: People, Places, and Pursuits. The publication includes resources for designing effective learning spaces, learning from others, assessing outcomes, enhancing cultural diversity, learning throughout the lifespan, and more.

Target Audience Database
http://wateroutreach.uwex.edu/cpb/tad/index.cfm

Developed by the University of Wisconsin's Environmental Resources Center, this site is a part of the project called Water Outreach Education—Facilitating Access to Resources and Best Practices. The project aims to better connect practitioners to resources on audiences and education practices. The database is searchable by audience, theme, best education practices, or citation.

University of Wisconsin–Stevens Point Online Course in Fundamentals of Environmental Education
http://www.uwsp.edu/natres/eetap/fee_course_page.aspx

Natural resource professionals, classroom teachers, nonformal educators, and others can take this online course for three graduate or undergraduate credits or as a non-credit online workshop. The course introduces students to the field of environmental education, covering topics such as environmental literacy, planning and implementing environmental education programs, assessment and evaluation, and creating effective learning environments. Online discussions and projects help build a community of students who can share information and ideas.

Education is not preparation for life; education is life itself.
—John Dewey

Evaluation

Designing Education Projects: Needs Assessment, Project Planning and Implementation, and Evaluation
http://www.oesd.noaa.gov/pdfs/DEP%20Manual_2ndEdt_Final.pdf

Published by the National Oceanic and Atmospheric Administration (NOAA), this guide to education planning contains a wealth of resources for program evaluation. The publication provides guidance on needs assessment, evaluation techniques, data collection, and data analysis.

EUGENE
https://www.math.duke.edu/cgi-bin/eugene

Developed by the U.S. Forest Service, the U.S. Environmental Protection Agency, the University of Georgia, and the University of Michigan, EUGENE (Ecological Understanding as a Guideline for Evaluation of Nonformal Education) is an evaluation tool you can download and use with students. The tool helps measure students' baseline knowledge of ecological principles and then assesses knowledge gain of those principles after an education program. The site allows you to select the principles you want to assess, add customized questions, print pre- and post-testing instruments, enter your data, and analyze your results.

Evaluating Your Environmental Education Programs: A Workbook for Practitioners
http://www.naaee.org/evalworkbook

Developed by Julie A. Ernst, Martha C. Monroe, and Bora Simmons, this publication walks you through how to design and conduct an evaluation of an education program. The workbook includes exercises to help gauge understanding and develop your own evaluation. Case studies round out the workbook, with examples of how the workbook's concepts have been put into action in other programs.

Innovation Network
http://www.innonet.org/

The Innovation Network is a nonprofit evaluation consulting firm for nonprofits. Their site provides resources, including the free Point K tool, which walks users through developing and implementing evaluations. The site also includes information associated with their Center for Evaluation Innovation, which works to find new approaches to evaluate hard-to-measure activities such as communications, policy change, and community organizing.

My Environmental Education Evaluation Resource Assistant (MEERA)
http://meera.snre.umich.edu/

MEERA is a website developed to be an "online evaluation consultant." The site provides a step-by-step guide to planning and conducting evaluations, and includes a variety of resources for all stages of the evaluation process. The site's developers have labeled the resources to indicate whether they're appropriate for novice, intermediate, or experienced evaluators.

National Marine Sanctuaries' Education Project Evaluation Site
http://sanctuaries.noaa.gov/education/evaluation/welcome.html

The National Oceanic and Atmospheric Administration's (NOAA) National Marine Sanctuaries site includes education resources, and among those resources is a site devoted to project evaluation. The site includes detailed tools and examples for everything from planning and designing an evaluation to reporting the results.

Research Methods Knowledge Base
http://www.socialresearchmethods.net/kb/index.php

Available online and in print, this resource compiles materials associated with an undergraduate course in social science research methods. The Knowledge Base takes you through all the steps of the research process, from forming questions to collecting, analyzing, and reporting data.

Toolkits: A Practical Guide to Planning, Monitoring, Evaluation, and Impact Assessment
http://www.savethechildren.org.uk/en/54_2359.htm

Developed by Save the Children, this book is designed for international development workers. Many of the principles of planning, monitoring, and evaluation apply equally well to conservation projects, as development and conservation work often go hand in hand. The book is particularly rich in information and tools for monitoring and evaluation. Some of the topics covered include: involving the right people, systematic data collection and analysis, assessment, monitoring, review and evaluation, and impact assessment. Also included is a compilation of tools for participatory learning, surveys, cost-effectiveness analysis, stakeholder analysis, and others.

University of Wisconsin Cooperative Extension Evaluation Web Site
http://www.uwex.edu/ces/pdande/evaluation/index.html

University of Wisconsin's Cooperative Extension hosts a website that offers comprehensive resources for conducting evaluations. Materials include guidance on how to use logic models to plan and evaluate programs, how to protect human subjects of research, using online surveys, and much more. These are practical, free tools.

University of Wisconsin–Stevens Point Online Course in Applied Environmental Education Program Evaluation
http://www.uwsp.edu/natres/eetap/aeepe_course_page.aspx

Natural resource professionals can take this online course for three graduate credits or as a non-credit workshop. The class has a practical focus, helping students create a comprehensive plan to evaluate one of their own educational programs. The program offers instruction in program evaluation and also creates an online community of students who can share information and ideas.

What does it mean to pre-board? Do you get on before you get on?
—George Carlin

Human Dimensions

Assessment of Public Knowledge, Values, and Attitudes toward Biodiversity and Sustainable Forestry
http://warnercnr.colostate.edu/docs/hdnr/CSU_HDNR_Biodiversity_Project_Literature_Review.pdf

This literature review was compiled as the first phase of a larger Colorado State University project focused on the human dimensions of sustainable forestry. The review includes research about public knowledge, attitudes, and values toward biodiversity, forests, forest management, wildlife, endangered species, and more. Information on the larger project can be found here: http://warnercnr.colostate.edu/biodiversity.html.

Conservation Psychology: Understanding and Promoting Human Care for Nature
http://www.wiley.com?WileyCDA/WileyTitle/productCD-140519409X.html

This textbook introduces readers to the emerging field of conservation psychology. It provides an overview of what we know about people's relationships with the natural world, including how we think about and interact with nature. The book concludes with information on how to promote conservation, including sections on sustainable behavior, community psychology, environmental education, and the psychology of hope.

HD.gov
http://www.hd.gov/HDdotGov/

Developed and managed by a partnership of government agencies, this site offers natural resource management professionals a gateway to information on the social aspects of conservation. The site provides overviews of a range of social science tools with links to social and environmental data providers, publications, case studies, and more. Users can also submit content to update the site.

Human Dimensions of Natural Resources Lab at Texas A&M University: Publications
http://www.humandimensionslab.org/publications.asp

According to their site, "The Human Dimensions of Natural Resources Lab (HDNR) examines the human element relating to use, development, and management of natural resources." Their site includes resources that explore the human aspects of natural resource management, including links to publications and resources on place attachment; motivation; price, fees, and willingness to pay; and others.

NOAA Coastal Services Center Human Dimensions Program
http://www.csc.noaa.gov/cms/human_dimensions/

According the NOAA Coastal Services Center Human Dimensions Program site, "Some of the most challenging decisions in coastal management stem from the relationship between people and the environment." With those challenges in mind, the program offers this site with links to resources in social science applications, needs assessment, performance measurement, social assessments, and more.

The Value of Life: Biological Diversity and Human Society
http://islandpress.org/bookstore/details62d3.html?prod_id=394

Yale professor Stephen Kellert describes ten basic ways that humans value nature. He explains how human values can vary by demographics, activities, culture, species, and more. The book concludes with a discussion of the policy and management implications of the ways we value nature.

Who Cares About Wildlife? Social Science Concepts for Exploring Human-Wildlife Relationships and Conservation Issues
http://www.springer.com/environment/environmental+management/book/978-0-387-77038-3

In this book, author Michael Manfredo explores the connections between people and wildlife, focusing on biological and emotional connections. The book discusses social and wildlife values, behavior theory, cultural forces, and the shifting nature of Americans' wildlife values.

Your best teacher is your last mistake.
—Ralph Nader

Social Marketing

The Basics of Social Marketing: How to Use Marketing to Change Behavior
http://www.turningpointprogram.org/Pages/pdfs/social_market/smc_basics.pdf

This resource provides a concise overview of social marketing and walks readers through strategic questions to ask when developing a marketing plan. It also explains key terms in social marketing and provides resources for more information. Developed by the Turning Point Social Marketing National Excellence Collaborative, it was developed for use in public health, but the information is useful to anyone taking on a social marketing campaign.

Community Tool Box
http://ctb.ku.edu/en/default.aspx

Developed by the University of Kansas, the Community Tool Box is a repository of information about working for change in communities. Needs assessment, strategic planning, organizational leadership, implementing interventions, cultural competence, evaluation, and financing are just some of the topics covered throughout the site. The Tool Box is searchable and also offers the opportunity to ask questions of advisors.

Fostering Sustainable Behavior: Community-Based Social Marketing
http://www.cbsm.com

This is an online resource for environmental professionals working to encourage sustainable behaviors. The site includes the full contents of the book *Fostering Sustainable Behavior,* by Doug McKenzie-Mohr and William Smith. The site provides a searchable database of articles, case studies, strategies, and discussion forums for professionals working in agriculture and conservation, energy, transportation, waste and pollution, and water.

Hands-On Social Marketing: A Step-by-Step Guide to Designing Change for Good
http://www.social-marketing.com/book.html

Nedra Kline Weinreich's handbook to social marketing distills the process into clear steps, including planning, audience targeting, message development, pretesting, implementation, and evaluation. Although it's not designed specifically for use in the environmental realm, the concepts are relevant for any social marketing campaign.

Social Marketing in the 21st Century
http://www.sagepub.com/booksProdDesc.nav?prodId=Book227601

This book from Georgetown University professor Alan Andreasen describes how social marketing can be used to achieve broad social change. It provides an overview of social marketing and explains three frameworks for influencing behavior. This book was a finalist for the 2006 Berry-AMA Book Prize for Best Book in Marketing.

Tools of Change
http://www.toolsofchange.com/en/home/

This site offers planning tools and case studies to professionals working for social change in the fields of environment, health, and safety. Create a free account to take full advantage of the site's resources and functions, including the ability to save your work between visits as you use the planning tools.

Social Media

If you have a big enough dictionary, just about everything is a word.

—Dave Barry

Getting Started with Social Media: Thirty-Five Things You Should Know About Facebook, Twitter, and Other Networks
http://img.constantcontact.com/docs/pdf/35_things_you_should_know.pdf

Created by the e-mail marketing firm Constant Contact, this free downloadable PDF offers a broad introduction to social media. It describes the major social media sites, the pros and cons of each, and tips for using the sites. Though developed for businesses, much of the information is useful for anyone who wants use these sites to spread a message or build a network.

Guide to Online Video for Nonprofits
http://www.see3.net/guide

In this seven-part video series, See3 Communications provides nonprofits with tips for using online video. Although much of the focus is on using video to support fundraising, the lessons apply to anyone trying to reach an audience with a request, whether for action, donations, or attention to an environmental issue.

The Networked Nonprofit
http://www.bethkanter.org/the-networked-nonprofit/

Beth Kanter's book explains how networked nonprofits use social media tools such as Facebook to create two-way conversations with their constituents. This two-way communication can lead to more transparent organizations, which, according to Kanter, are "easy for outsiders to get in and insiders to get out." Also, Kanter maintains a blog at http://www.bethkanter.org/, where she posts regularly about how nonprofits are using social media.

Social Media Video for Nonprofit Organizations
http://www.youtube.com/watch?v=142-FPKXo_k

Video firm Primitive World Productions produced this short piece that gives nonprofits three tips for effectively using film as a social media tool. They describe several types of persuasive videos, as well as how to use them to further your cause.

Ten Resources That Will Help Your Nonprofit Use Social Media
http://nonprofit.about.com/od/nonprofitpromotion/tp/Resources-for-Social-Media.htm

About.com's guide to nonprofits has written this and several other articles related to using social media to advance the work of nonprofits. This article explains benefits and opportunities related to the use of social media and links with helpful resources. It also lists other articles of interest to nonprofits that want to expand their work in the digital realm.

We Are Media: Social Media Starter Kit for Nonprofits
http://www.wearemedia.org/About+Project+Background

The Nonprofit Technology Network (NTEN) developed this site to build a community of nonprofit professionals who are using social media. The site provides resources for planning, creating, and distributing social media campaigns and efforts.

People have forgotten how to tell a story. Stories don't have a middle or an end any more. They usually have a beginning that never stops beginning.
—Steven Spielberg

Stakeholder Engagement

Community-Based Environmental Protection: A Resource Book for Protecting Ecosystems and Communities
http://www.epa.gov/care/library/howto.pdf

This publication from the U.S. EPA provides a compendium of examples of U.S. community-based conservation efforts. The book highlights some of the successful approaches, tools, and information that groups have used to protect environmental resources in their communities. The guidebook includes sections on developing an organization, assessing local ecosystems and their effects on communities, and choosing ecosystem protection strategies.

Introduction to Stakeholder Participation
http://www.csc.noaa.gov/cms/human_dimensions/Stakeholder_Participation_Guidance_Document.pdf

This publication from the National Oceanic and Atmospheric Association's Coastal Services Center describes how to involve stakeholders in environmental management. The resource includes sections on deciding when to involve stakeholders, identifying and analyzing stakeholder groups, key elements of stakeholder participation, and evaluating stakeholder participation.

Kitchen Table Sustainability: Practical Recipes for Community Engagement with Sustainability
http://kitchentablesustainability.com

This book from Wendy Sarkissian and colleagues distills extensive research on stakeholder involvement into everyday ideas for engaging people in working toward sustainability. At the heart of the book is what the authors call the EATING approach to engaging people in sustainability: Education, Action, Trust, Inclusion, Nourishment, and Governance.

National Park Service Community Toolbox
http://www.nps.gov/nero/rtcatoolbox/index_comtoolbox.htm

The National Park Service's Rivers, Trails, and Conservation Assistance Program developed this online resource for tips on engaging communities. The site includes resources for decision making, events, gatherings, visual and written communication, facilitation, organization, outreach, and collecting information.

A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions
http://www.rwjf.org/files/research/49951.stakeholders.final.1.pdf

Compiled by the Robert Wood Johnson Foundation, this guide helps project managers develop evaluation questions that reflect the perspectives and insights of as many relevant people and groups as possible. Stakeholders can focus an evaluation on what's most important, and can increase the credibility of evaluation results. Although the guide is most relevant for foundation staff and is developed by a foundation with a focus on health care, the content is helpful to anyone who wants to involve stakeholders in program evaluation. The guide includes a five-step process for engaging stakeholders, and includes a list of additional evaluation resources.

The Public Participation Handbook: Making Better Decisions through Citizen Involvement
http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787973076.html

Public participation consultant James Creighton shares strategies for engaging stakeholders in environmental and public policy decisions. The book covers what public participation is (and isn't) and how to design a public participation program. It includes a toolkit of techniques for encouraging participation and designing public meetings, and provides case studies to illustrate the techniques in action.

Public Participation Process Planner
http://www.peopleandparticipation.net/display/ProcessPlanner/Home

Developed by a partnership of organizations in the United Kingdom, the ideas and techniques in this online tool are designed for an international audience of practitioners. The process planner helps practitioners find participatory approaches that fit their situation and stage of the decision-making cycle. The tools help analyze and plan a project's scope, purpose, participants, context, follow up, and results.

Stakeholder Engagement Strategies for Participatory Mapping: A Decision-Making Tool for Communities
http://www.csc.noaa.gov/participatory_mapping/

Another publication from the National Oceanic and Atmospheric Association's Coastal Services Center, this guide outlines how participatory mapping can be used for stakeholder engagement. Participatory mapping encourages stakeholders to map their resources, perspectives, and priorities. This publication provides an overview of participatory mapping and strategies for facilitating the participatory mapping process.

Stakeholder Participation for Environmental Management: A Literature Review
http://www.see.leeds.ac.uk/research/sri/working_papers/SRIPs-08.pdf

In this paper, researcher Mark Reed reviews the literature on stakeholder participation in the environmental realm. The paper covers the types of participation and the evidence on the claims surrounding the benefits of stakeholder participation. The paper also presents a list of best practices in stakeholder participation based on a literature review.

Understanding and Influencing Behaviors: A Guide
http://www.worldwildlife.org/bsp/publications/bsp/behaviors_eng/behaviorsguide_eng.pdf

Written by Bruce Byers for the Biodiversity Support Program, this guide describes nine steps to influencing behaviors. With an international focus, the guide details how to identify and initiate a dialogue with stakeholders, work with stakeholders to identify behaviors affecting the environment, prioritize and agree on critical behaviors to address, develop activities to influence behaviors, and adaptively manage the project with the help of monitoring and evaluation.

Why don't they make the whole plane out of that black box stuff?
—Steven Wright

Influencing Conservation Action: What the Research Says About Environmental Literacy, Behavior, and Conservation

Research is creating new knowledge.
—Neil Armstrong

What Does the Research Say About Conservation Action?

This section of the toolkit summarizes some of the key research on how we understand and influence environmental behavior. It is not intended to be a comprehensive literature review; rather we've used a range of literature to address common questions asked by conservation practitioners. These answers represent an initial step toward compiling and synthesizing literature related to the planning process outlined in this toolkit. We intend to update this section as we receive new questions, research tips, and feedback from colleagues. So please contact us with additional questions, resources, and research related to building a stronger conservation constituency and moving people to take conservation action.

What the Research Tells Us:
Twenty Questions

To check out the questions and answers and what the research says, visit **audubon.org/toolkit.**

1. How do researchers explain what makes people take certain actions?
2. What's the difference between how education and social marketing lead to changing environmental behavior?
3. Does knowledge lead to action?
4. Do people's attitudes move them to action?
5. How important is it for people to feel that they have the skills to take action—and that what they do makes a difference?
6. Is increasing environmental literacy an effective tool in encouraging environmental behavior?
7. Are people more likely to do something they think will be easy?
8. How can incentives and rewards encourage people to adopt new behaviors?
9. People seem to appreciate having lots of options, but can we give people too many options in terms of things they can do?
10. Is the messenger as important as the message?
11. In terms of influencing one's own behaviors, how much does it matter what other people do?
12. Are people more motivated by positive or negative messages?
13. At what age can kids actually have an impact on conservation results?
14. Does connecting kids to nature have an impact on conservation over the long term?
15. What makes people take political action?
16. What is the best way to engage stakeholders in conservation planning?
17. What motivates people to volunteer? And does volunteering affect people's environmental behavior in other areas of their lives?
18. Do adults learn differently than children, and should we use different approaches and techniques when working with adult audiences?
19. Does being involved in local environmental action increase the likelihood that an individual will become involved in taking pro-environmental actions at larger scales, such as state, national, and global levels?
20. Can children influence their parents' environmental behavior?

The Case Study Collection

If history were taught in the form of stories, it would never be forgotten.
—Rudyard Kipling

The Case Study Collection

The case studies highlighted below demonstrate how education, social marketing, civic engagement, and other social strategies can help lead to conservation results. Collected from around the world, each of the twenty-plus case studies tells a remarkable story of how groups have successfully planned and implemented conservation projects with people in mind. It's clear that some planning processes were stronger than others—and that some strategies worked better than others. But each group's story is documented here so that you can learn their lessons—and gain insights into what can be accomplished when conservation strategies and social strategies are brought together.

> To read the case studies listed below and learn what others have done, visit **audubon.org/toolkit.**
>
> Audubon

Case Studies

- The Beach Vitex Task Force
- The Climate and Energy Project
- How Cook Stoves and Crocheting Are Saving the Cotton-Top Tamarin
- Restoring the Dixon Creek Riparian Zone
- Harpy Eagles Get a Boost Through Education
- Engaging Fish Harvesters in Wolffish Recovery
- Restoring a Pine Forest, One Tree at a Time
- Getting a REAL Education in Thailand
- Community Conservation in Ohio: Getting Rid of Invasives
- The Monterey Bay Aquarium Seafood Watch® Program: Connecting Seafood Choices and Healthy Ocean Ecosystems
- People and Plovers
- Protecting Kenya's Samburu District: A Rare Pride Campaign
- Creating a Safe Place for Purple Martins
- Getting the Community to Care: Crooked Tree Wildlife Sanctuary
- Building Careers, Restoring a Forest
- Bringing Back Washington's Native Prairies
- Saving the Pemba Flying Fox: Community-Based Conservation in Action
- Seabird Conservation in the Gulf of St. Lawrence
- SEE Turtles: Saving Sea Turtles through Ecotourism
- Species at Risk: Educating Farmers About Ontario's Endangered Species
- Students and Teachers Join Forces to Restore a Watershed

We should preserve every scrap of biodiversity as priceless while we learn to use it and come to understand what it means to humanity.
—E.O. Wilson

Diversity and the Conservation Movement

We all should know that diversity makes for a rich tapestry, and we must understand that all the threads of the tapestry are equal in value no matter what their color.
—Maya Angelou

By and large, the conservation movement has been comprised of a narrow demographic, even though many of the communities ignored or bypassed by the movement demonstrate strong conservation values and care deeply about the environment, justice, and civil society. Working with communities of color, low-income communities, and other audiences that have traditionally been underrepresented in conservation presents one of the most promising opportunities for achieving conservation success in the 21st century. It also presents an opportunity to push for greater equity and inclusion in the conservation movement and society as a whole. By promoting meaningful consultation, coordination, and shared leadership with a greater diversity of communities, we can strengthen and empower the entire conservation movement and build stronger communities. This section of the toolkit examines some of the barriers and challenges to diversifying the conservation movement and provides recommendations and examples about how to increase diversity and inclusion in our work.

Audubon

To read more about how to engage new and diverse audiences in conservation, visit **audubon.org/toolkit.**

And If you want a strong society, it has to be inclusive. If you have to push a boulder up a hill, do you want 10 people or 100? If you weed out color or gender, you get 10.
—Cyndi Lauper

What's the Story?—Why Storytelling Matters to Conservation

To be a person is to have a story to tell.
—Isak Dinesen

It takes a thousand voices to tell a single story.
—Native American saying

Stories are fundamentally about change. The Garden of Eden would just be a boring old tropical paradise if Adam and Eve hadn't been kicked out. The stories we tell literally make our world. So, if you want to change the world, you have to change the story. This storytelling guide will encourage you to think in creative and expansive ways about how to present your work using stories that highlight the most critical and empowering messages.

Audubon

To read more about storytelling and why it matters, visit **audubon.org/toolkit.**

There have been great societies that did not use the wheel, but there have been no societies that did not tell stories.
—Ursula K. LeGuin

As people alive today, we must consider future generations: a clean environment is a human right like any other. It is therefore part of our responsibility toward others to ensure that the world we pass on is as healthy, if not healthier, than we found it.
—Dalai Lama

*The future is not what's going to happen,
it's what we're going to do.*
—Jorge Luis Borges