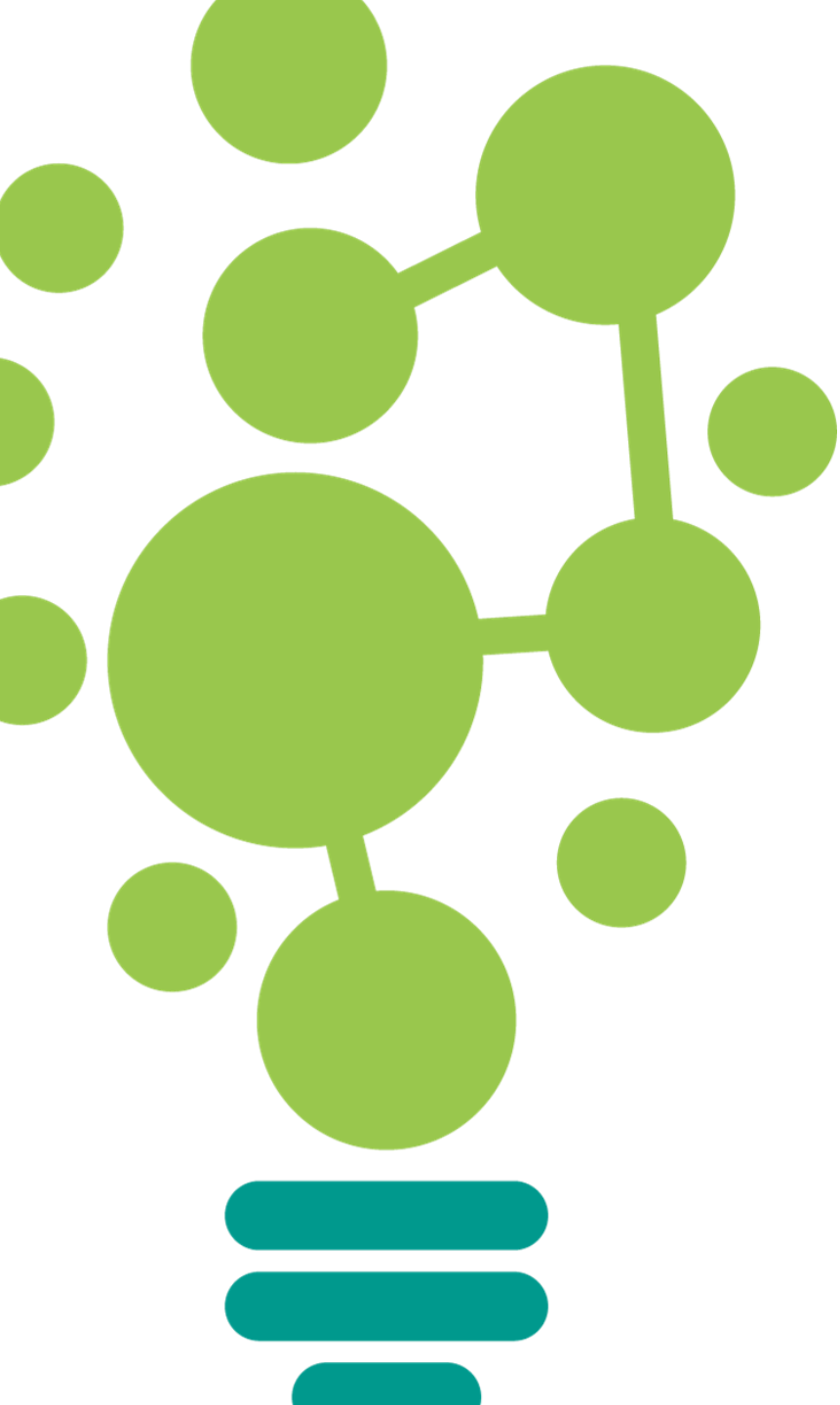


The Building Blocks of Behavior Change



Dr. Beth Karlin

seechange
INSTITUTE



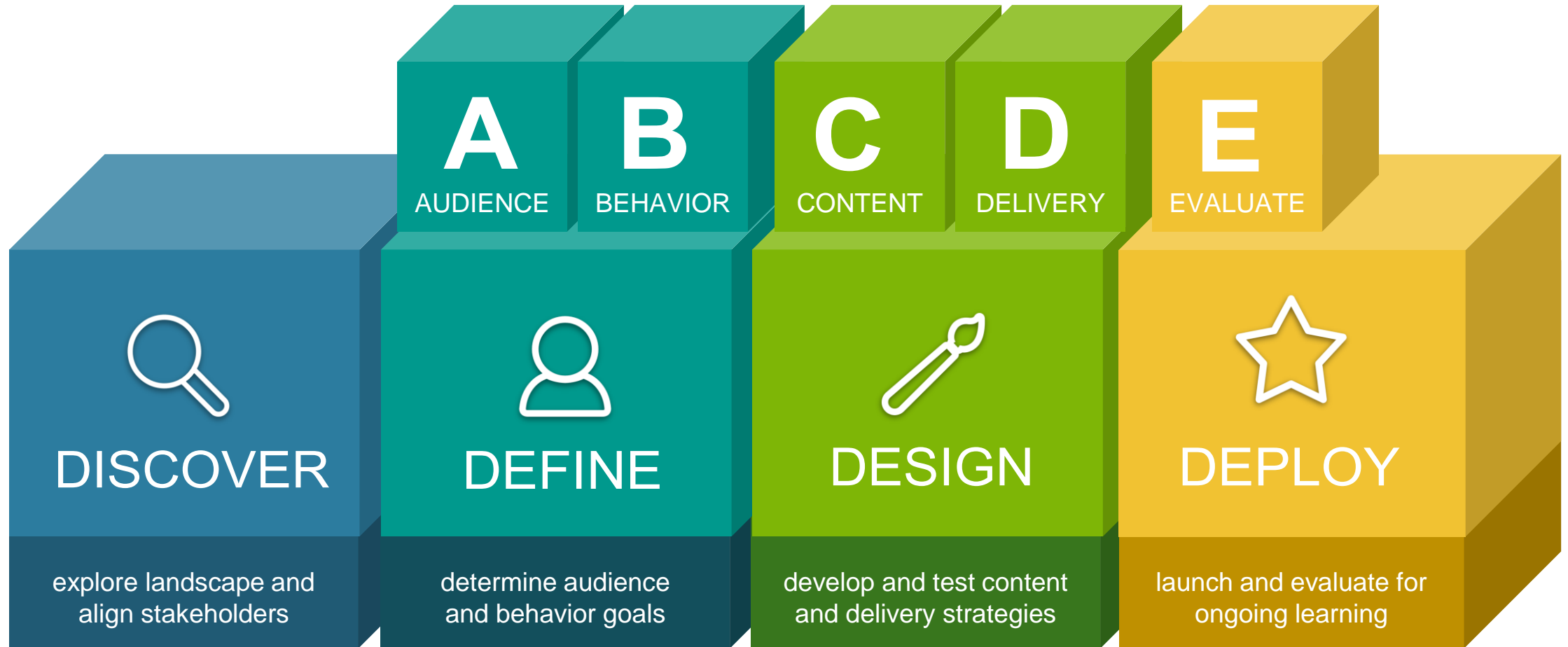


We specialize in

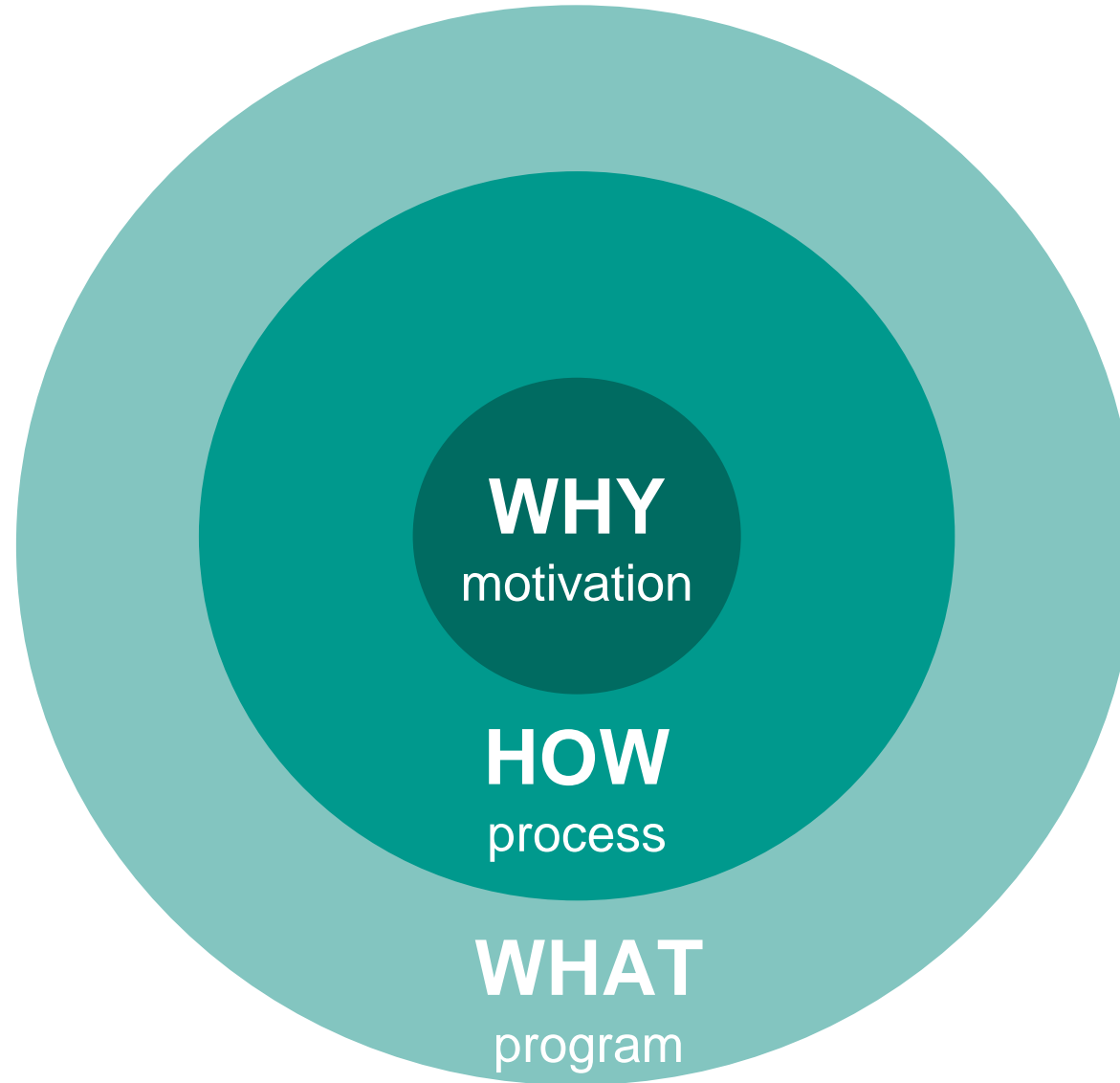
- **Research**
- **Strategy**
- **Design, and**
- **Evaluation**

of energy, health, & media behavioral programs.

The Building Blocks of Behavior Change



But First....





What's the Alternative?



From Categories to Characteristics

Nutrition Facts

5 servings per program
Serving size (1 city)

kWh saved
 per serving: **80**

AUDIENCE

- Demographics
- Psychographics
- Context
- Culture

BEHAVIOR

- Type
- Number
- Frequency

CONTENT

- Message
- Strategy

DELIVERY

- Medium
- Messenger
- Timing

EVALUATION

- Metrics
- Methods
- Type (Process, outcome)



Does it Work?

Your Program



Desired Result



HOW Does it Work?

Your Program



Desired Result

Ingredients



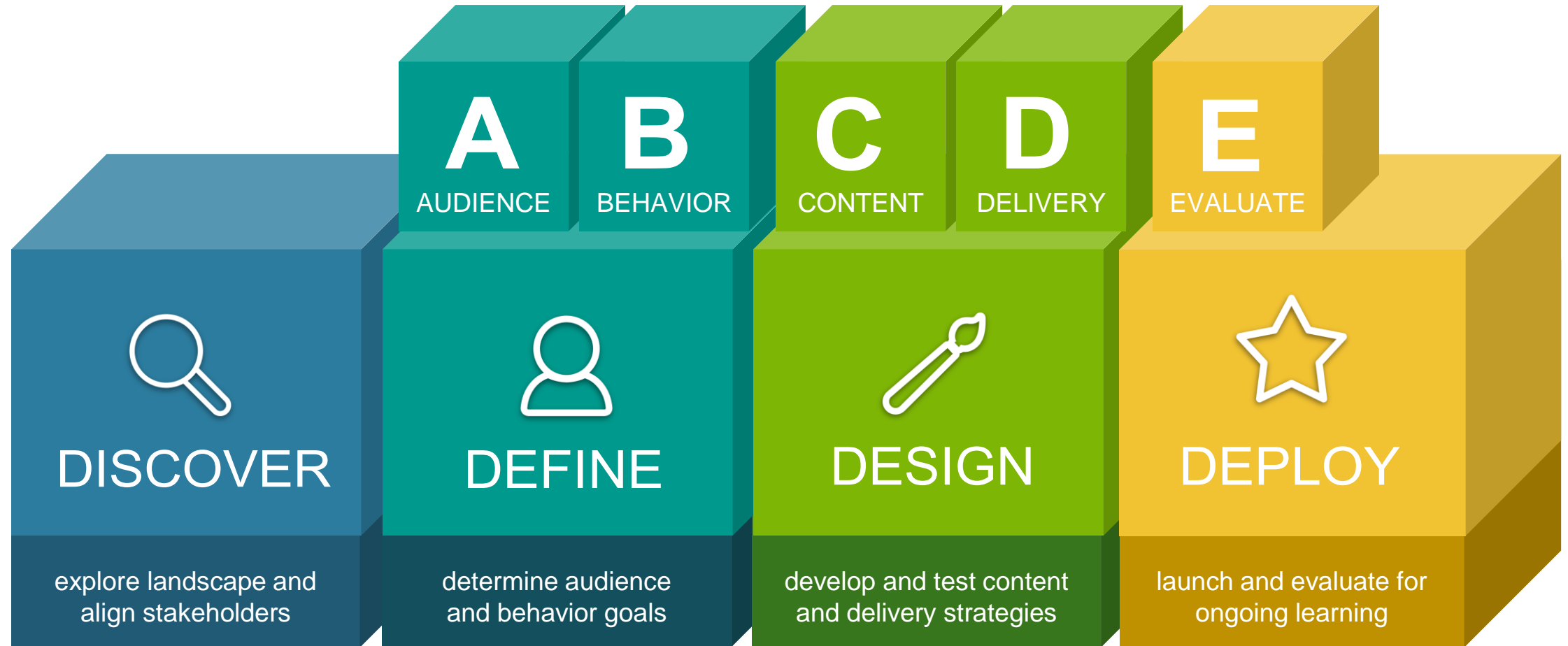
Activities/Processes



Metrics



A Process for Behavior Change





DISCOVER

explore landscape and align stakeholders

A

AUDIENCE

B

BEHAVIOR

C

CONTENT

D

DELIVERY

E

EVALUATE



DEFINE

determine audience and behavior goals



DESIGN

develop and test content and delivery strategies



DEPLOY

launch and evaluate for ongoing learning

Explore Landscape



- Literature Review
- Market Assessment
- Behavior Audit

Literature Review: Energy Feedback

- 100+ studies conducted since 1976
- Total n = 256,536 (mean 119/study)
- Mean r-effect size = .1174 ($p < .001$)
- Average energy savings: 9%

Significant variability in effects
(from **negative** to **over 20%** savings)

Literature Review: Energy Feedback

Moderators identified in meta-analysis:



WHO?

Study population



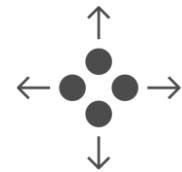
WHAT TYPE?

Feedback medium



HOW LONG?

Study duration



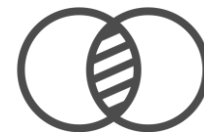
WHAT LEVEL?

Disaggregation



HOW OFTEN?

Frequency of feedback



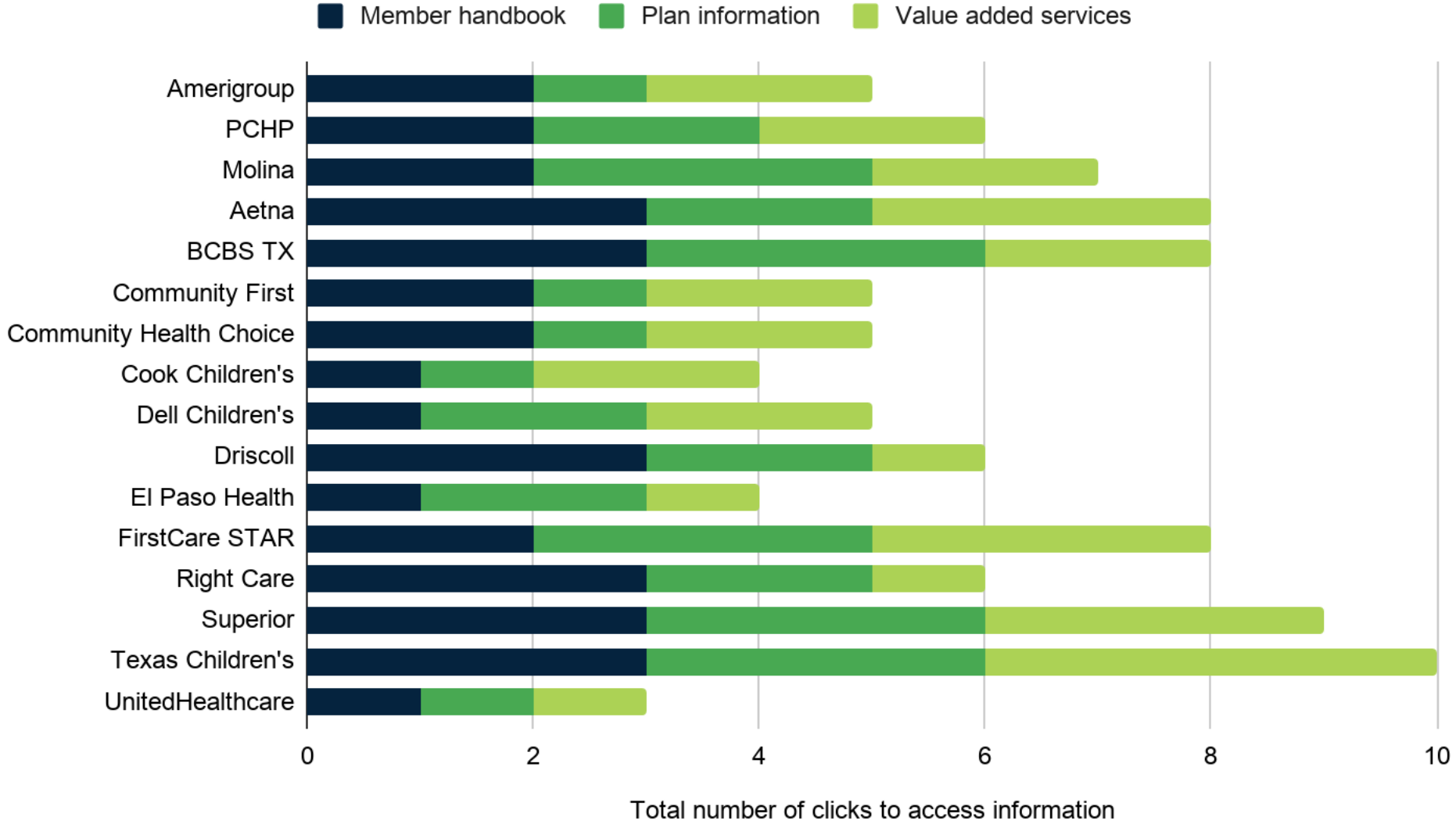
WHAT MESSAGE?

Comparison

Market Assessment: Medicaid Enrollment

	Material Type	Compared features
Channel	Website	Usability, design
	Social Media	Presence or absence, following, uses
Materials	Presentation of membership plans	Design, accessibility on website, handbook
	Presentation of value-added services	Design, monetary framing, number of services offered
	Online Handbook	Presence or absence, design, monetary framing
Advertising	Commercials, promotional videos, flyers	Presence or absence, design, message framing, cultural congruence

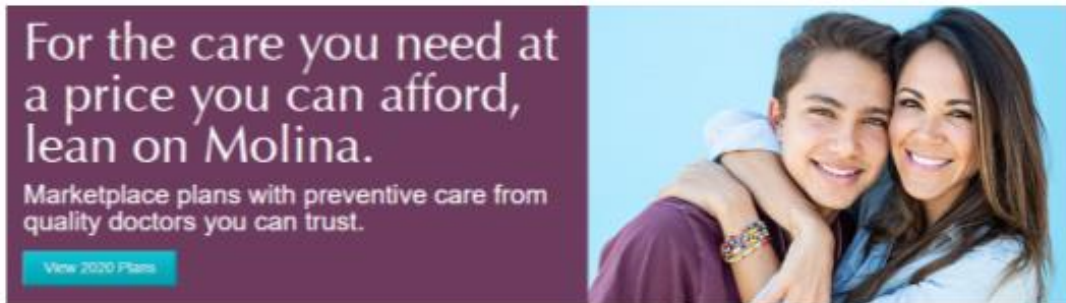
Market Assessment: Medicaid Enrollment



Behavior Audit: Medicaid Enrollment

Engage

Use of imagery is relevant to target demographic and look genuine



Posed image

People prefer photos that look genuine, rather than posed

Behavior Audit: Medicaid Enrollment

? **Confusion**
 Unclear what "your medical home" means
 Unclear call to action-What are members supposed to do?

Image not relevant
 Children leaving school not related to medical check-ups

Engage
 Strategic use of icons, bolding, bullet points, and lists

Too much text
 Text paragraphs are too long and font is too small

Parkland
 Community Health Plan, Inc.

Member Handbook Quick Tips

Why visitous are important to your children
 Visitous help prevent your child from becoming ill. They also make sure your child's health is good. Your doctor will give you advice on how to keep your child's health good. Visitous are important. They can help you and your doctor take care of your child's health.

How to renew
 You must renew your Medicaid coverage every year. You can renew online at www.parklandhmo.org or by calling 1-800-814-2233. You can also renew by mail. You will receive a renewal notice in the mail. You must renew by the date on the notice. If you do not renew, your Medicaid coverage will end. You can find more information at www.parklandhmo.org.

Regular visits to your Primary Care Provider and dentist
 Regular visits to your Primary Care Provider and dentist are important. They can help you and your doctor take care of your health. You should visit your Primary Care Provider every 6 to 12 months. You should visit your dentist every 6 months.

6 to 12 years	2 visits, 2 months, 4 months, 6 months, 8 months
13 to 17 years	12 months, 15 months, 18 months, 24 months, 30 months, 3 years, 4 years
18 to 20 years	Annually within 30 days of turning 18

Do you need a ride to the Primary Care Provider?
 If you are covered by Medicaid, you can get a ride to your Primary Care Provider. You must call PEP at least 48 hours before your appointment. You must also call PEP at least 48 hours before your appointment. You must also call PEP at least 48 hours before your appointment. You must also call PEP at least 48 hours before your appointment.

Should I go to the ER, Urgent Care, or call my Primary Care Provider?
 See your Primary Care Provider
 • When you are out of Medicaid
 • When you have questions about your medicine
 • When you have an allergic reaction
 • When you have a chronic illness
 • When you need a prescription
 • When you need a referral
 • When you need a specialist
 • When you need a second opinion

Go to Urgent Care (if your doctor's office is closed)
 • When you have an asthma, cough, cold, flu, sore throat, or ear pain
 • When you have a minor injury, such as a cut, burn, or bruise

Go to the Emergency Room
 • When you have a heart attack
 • When you have a stroke
 • When you have a seizure
 • When you have a severe allergic reaction
 • When you have a severe injury, such as a broken bone, deep cut, or burn
 • When you have a severe illness, such as pneumonia, meningitis, or a severe infection

Do you need more information?
 Call Member Services
 1-800-814-2233
 1-800-814-2233
 1-800-814-2233

www.parklandhmo.org

Align Stakeholders



Align Stakeholders

Who one is



What one knows



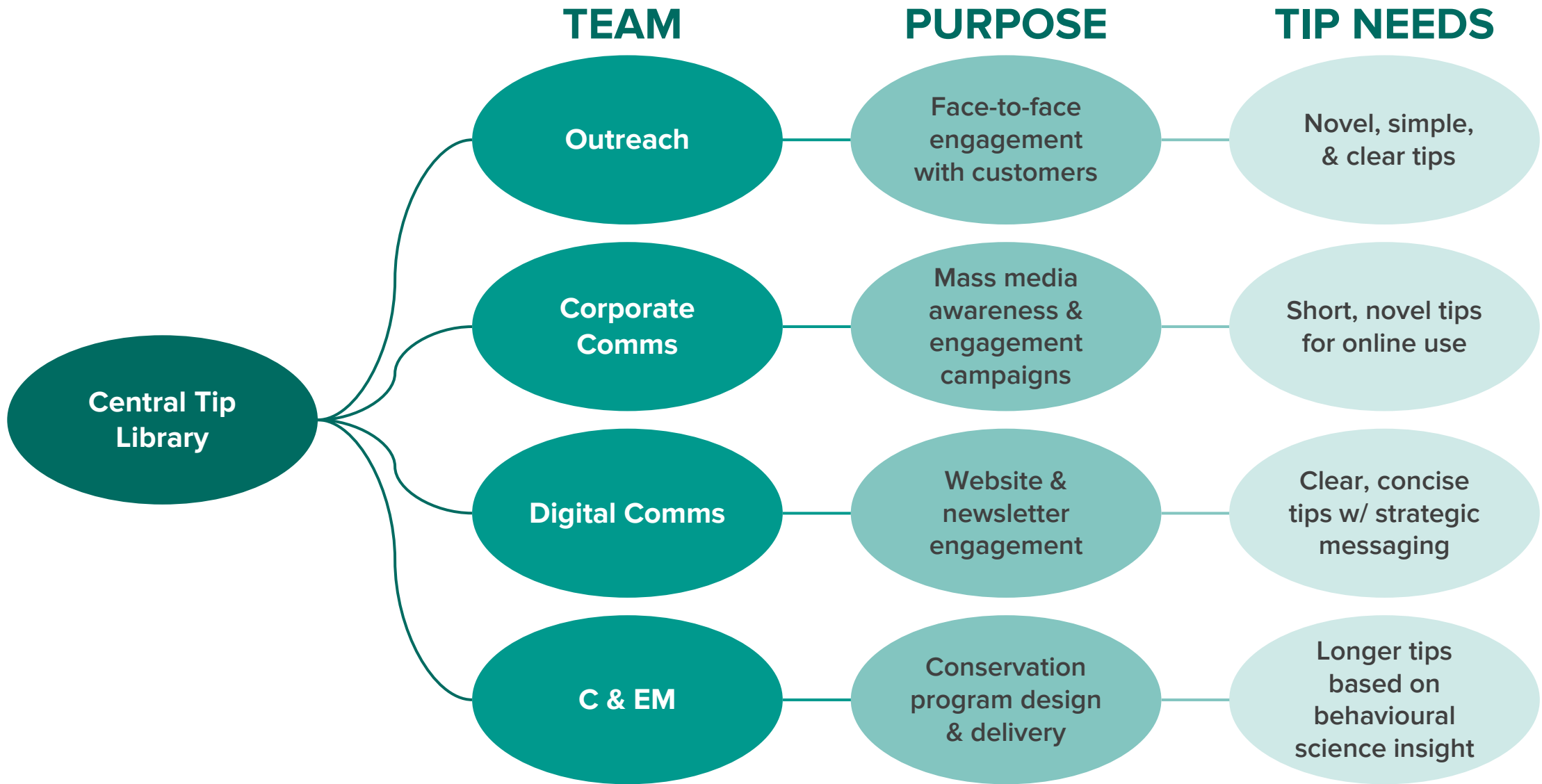
Whom one knows



Case Study: Tip Library

Sector Categorization (Res or Commercial)	Category	Subcategory	Keyword	Savings (\$%)	PRIMARY HEADLINE	ALTERNATIVE HEADLINE	Tip	Details/ Source Copy
COM	Cooling	Optimization	Optimize Temp settings		Optimize cooling systems		During summer (cooling season) cool your building to no lower than 24°C (75°F) when occupied. Avoid mechanical cooling when it is unoccupied, unless necessary for morning pre-cooling.	<ul style="list-style-type: none"> •Start morning pre-cooling so that the building is 26°C (78°F) when occupants arrive at the first hour of occupancy. •Keep the outdoor air damper fully open during the summer cooling season. •Where applicable, install adjustable speed drives on fans, chiller water pumps and heating pumps. •Maximize the use of outdoor air for space cooling using existing system capabilities and during the summer cooling season, flush the building during the night with cooler outdoor air. •Consider converting constant air volume systems to variable air volume systems. •Consider converting dual duct systems to single duct systems.
COM	Heating	Optimization	Optimize Temp settings		Optimize heating systems		During winter (heating season) heat your building to a maximum of 21°C (70°F) when occupied, 16°C (61°F) when unoccupied. Heating and cooling set points must be set 2-3°C (3-5°F) apart so that the air conditioner does not cycle (turn on and off) frequently.	<ul style="list-style-type: none"> •Start the morning temperature pick-up with outside air dampers closed so that the building is at 18°C (65°F) when occupants arrive. •Complete the warm-up during the first hour of occupancy. Similarly, set back the temperature for the last hour of occupancy. •Keep the outdoor air damper closed during the morning warm-up in winter •Where applicable, install adjustable speed drives on fans, chiller water pumps and heating pumps. •Consider converting constant air volume systems to variable air volume systems. •Consider converting dual duct systems to single duct systems.
COM	Heating/cooling	Minimize Heat Loss	heat loss		Minimize heat loss		If your building's ceiling is higher than 3.0 meters (10 feet), consider installing ceiling fans to force the warm air down to the occupied level. As the temperature gradient will be minimal, the heat loss will be reduced.	Office areas in buildings with high-ceilings (like warehouses) need their own ceilings, not just wall partitions. Otherwise, warm air rises to the high ceiling, causing the heater to run constantly. If your building's ceiling is higher than 3.0 meters (10 feet), consider installing ceiling fans to force the warm air down to the occupied level. As the temperature gradient will be minimal, the heat loss will be reduced.

Case Study: Tip Library



Case Study: Tip Library

Ability to prioritize tips

One centralized library

Variety of tips

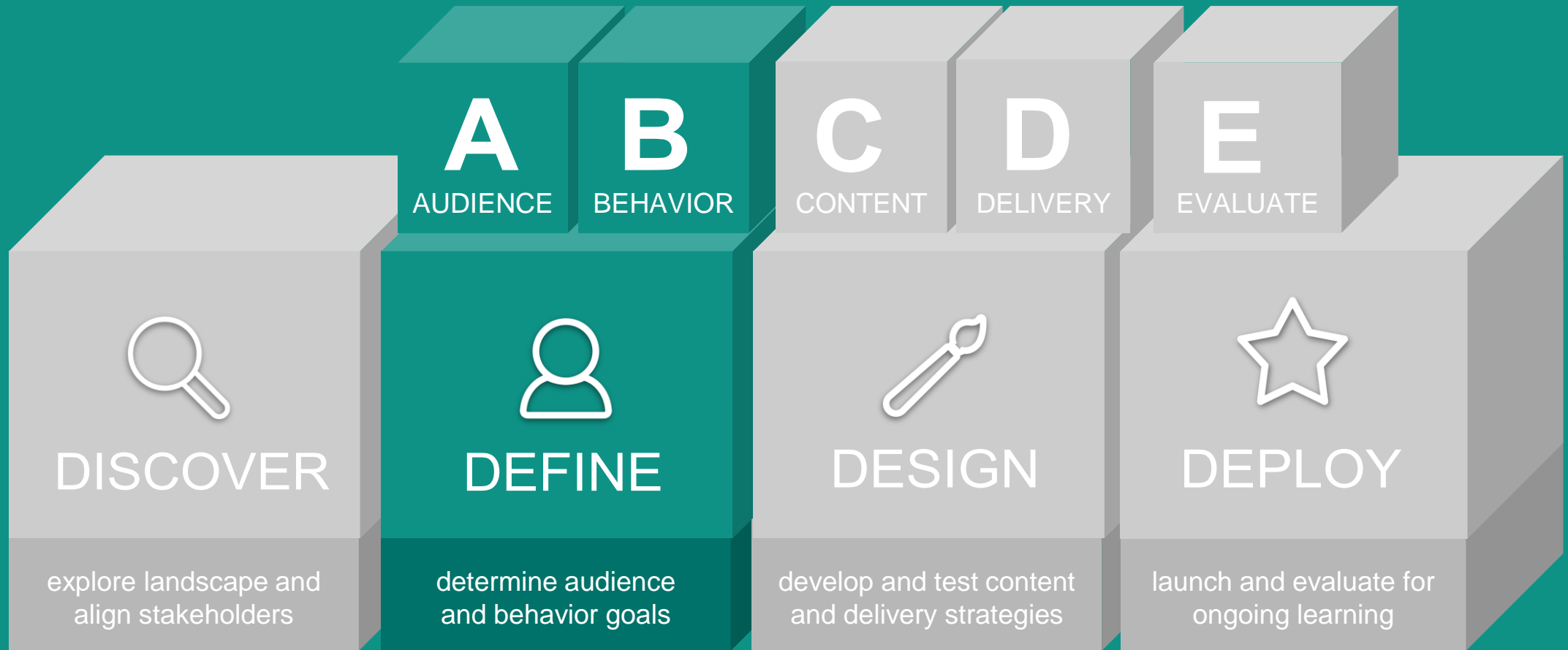
Updated regularly

Systematic approach
to use and evaluation

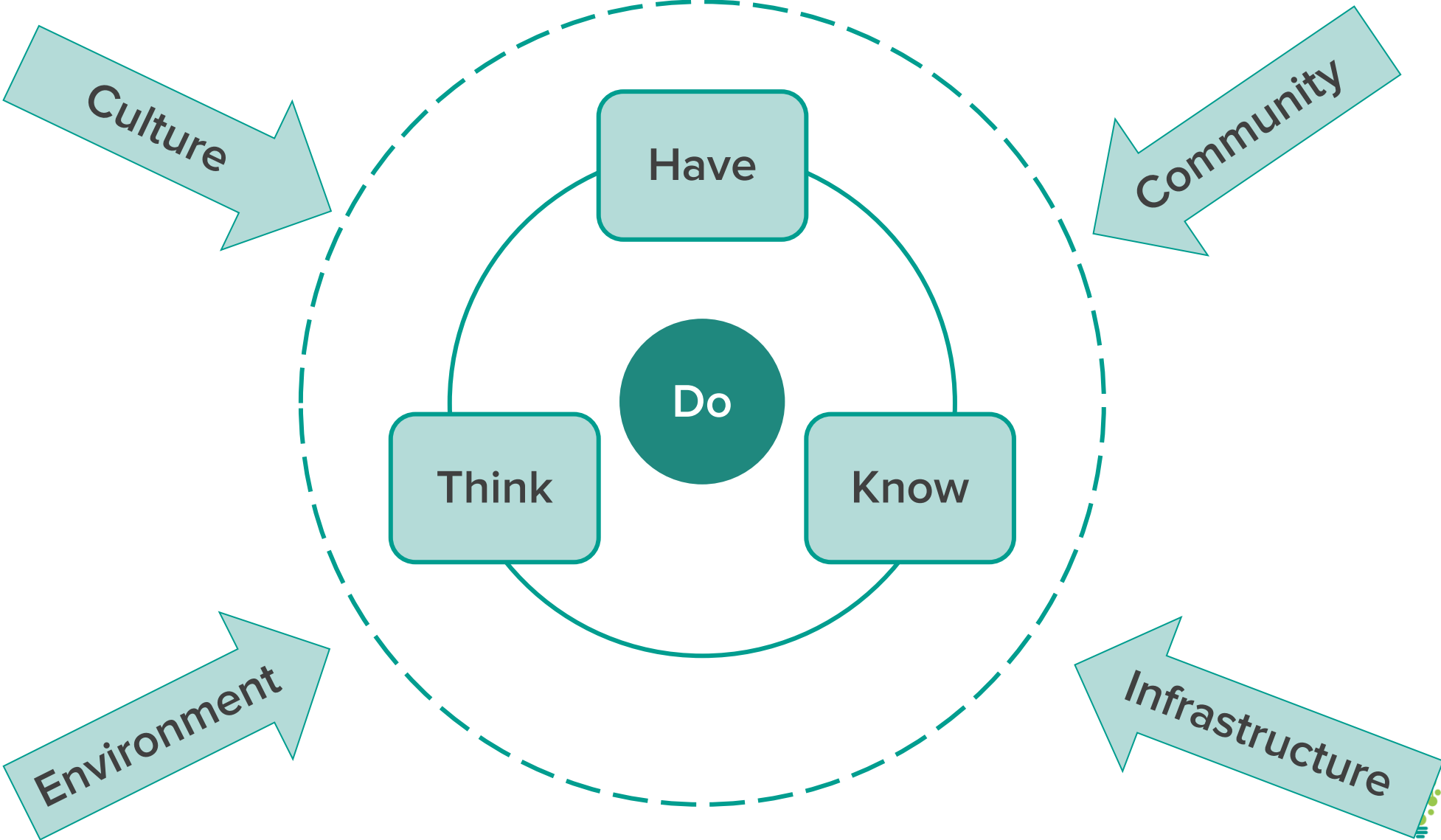
Content is researched
and vetted







Audience and Behaviors



Listening to Your Audience

- 1 Observation
- 2 Interviews
- 3 Focus Groups
- 4 Surveys



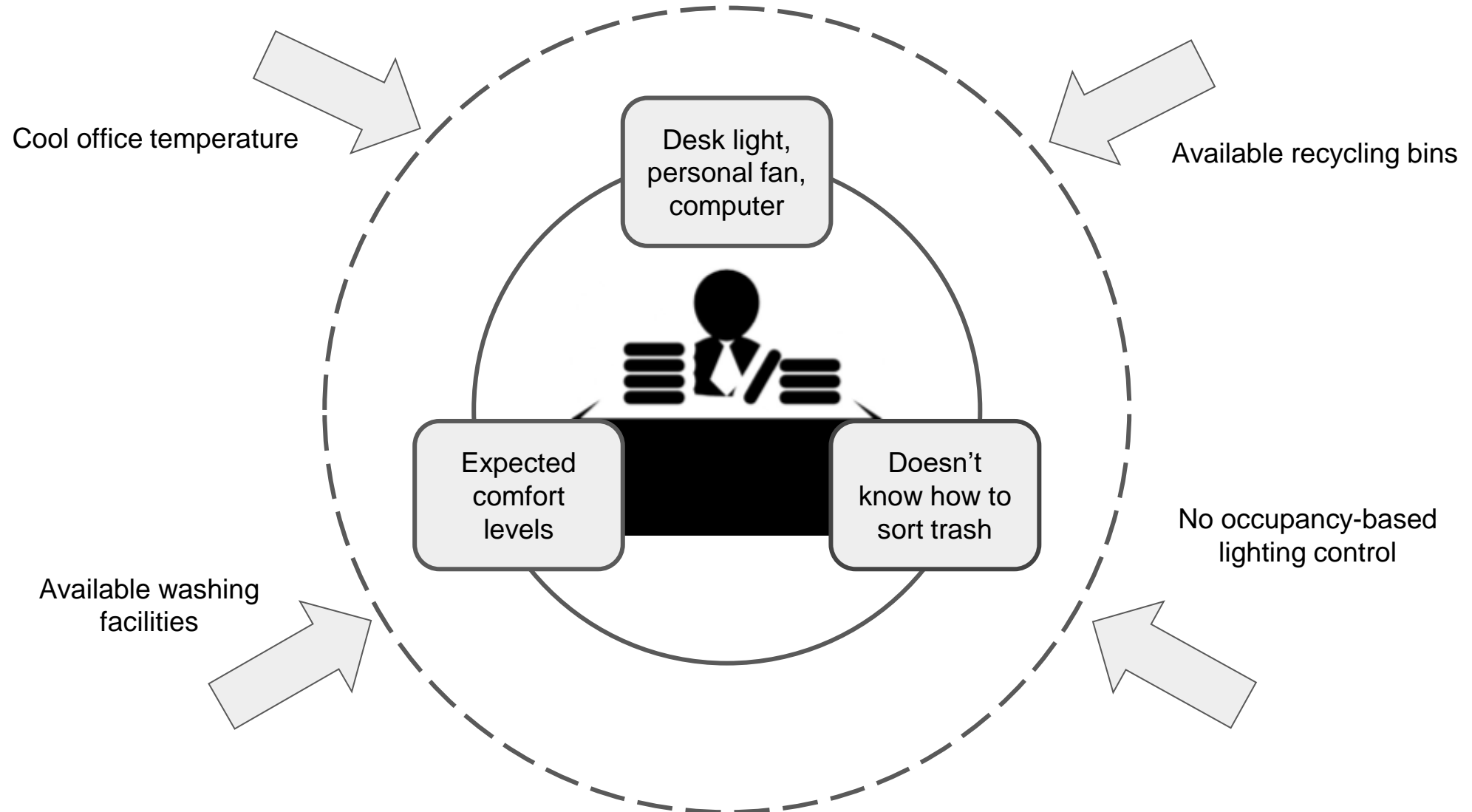
“What if, and I know this sounds kooky, we communicated with the employees.”

Case Study: Step Up and Power Down

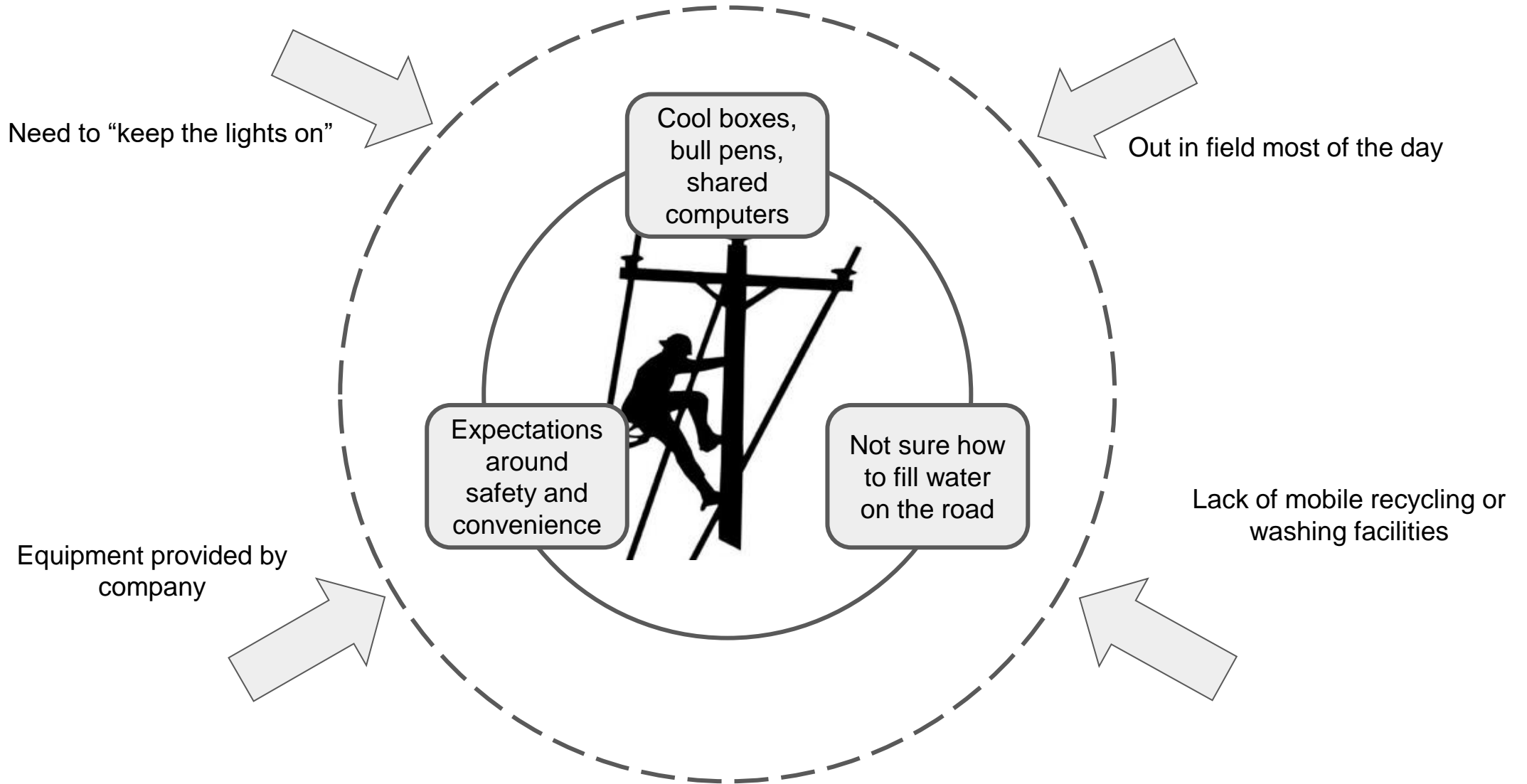
- Observation
- Interviews
- Focus groups
- Survey



Case Study: Step Up and Power Down



Case Study: Step Up and Power Down



Case Study: Step Up and Power Down

HAVE: Personal electronics and disposable items

THINK: Low understanding of the right actions to take.

KNOW: Aware of corporate values.

DO: Different work schedules for office / field staff.

Target Audience: All staff in 3 service centers

Target Behaviors:



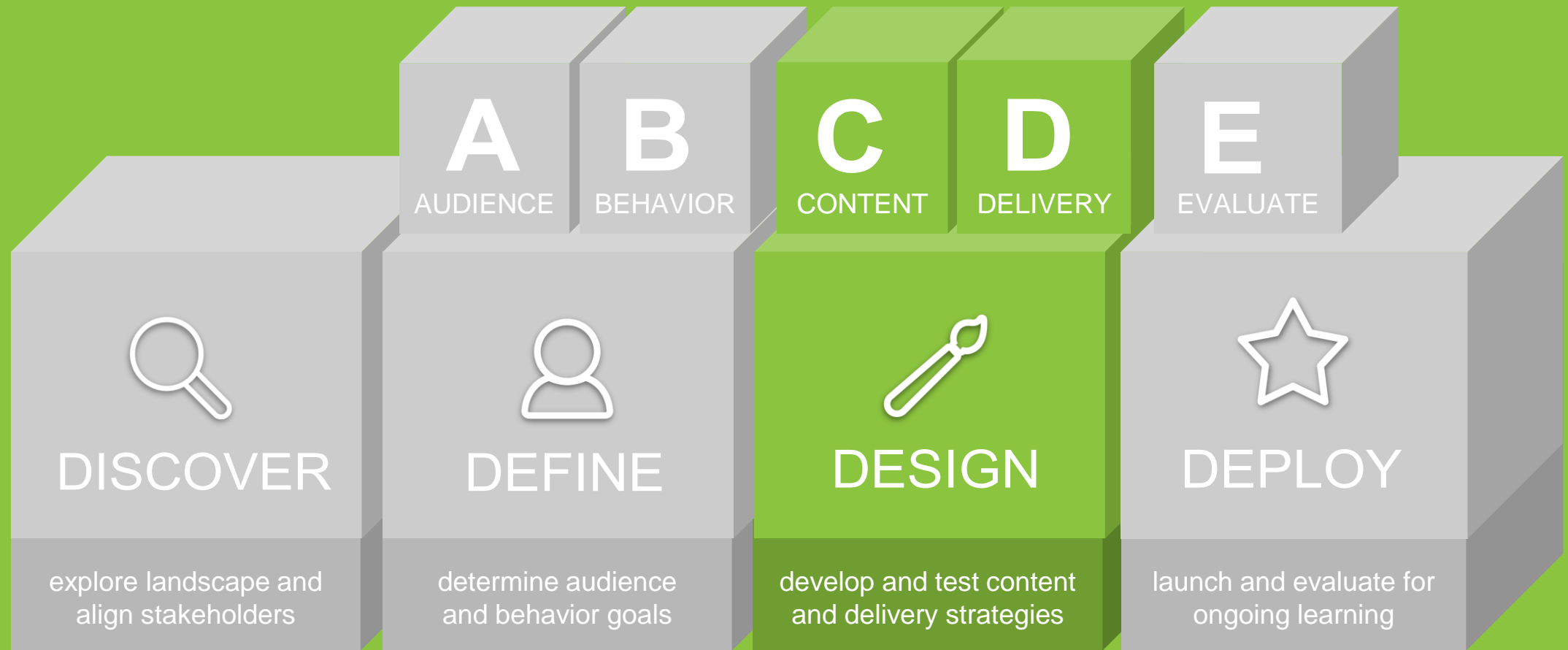
REDUCE energy by unplugging electronics when not in use.



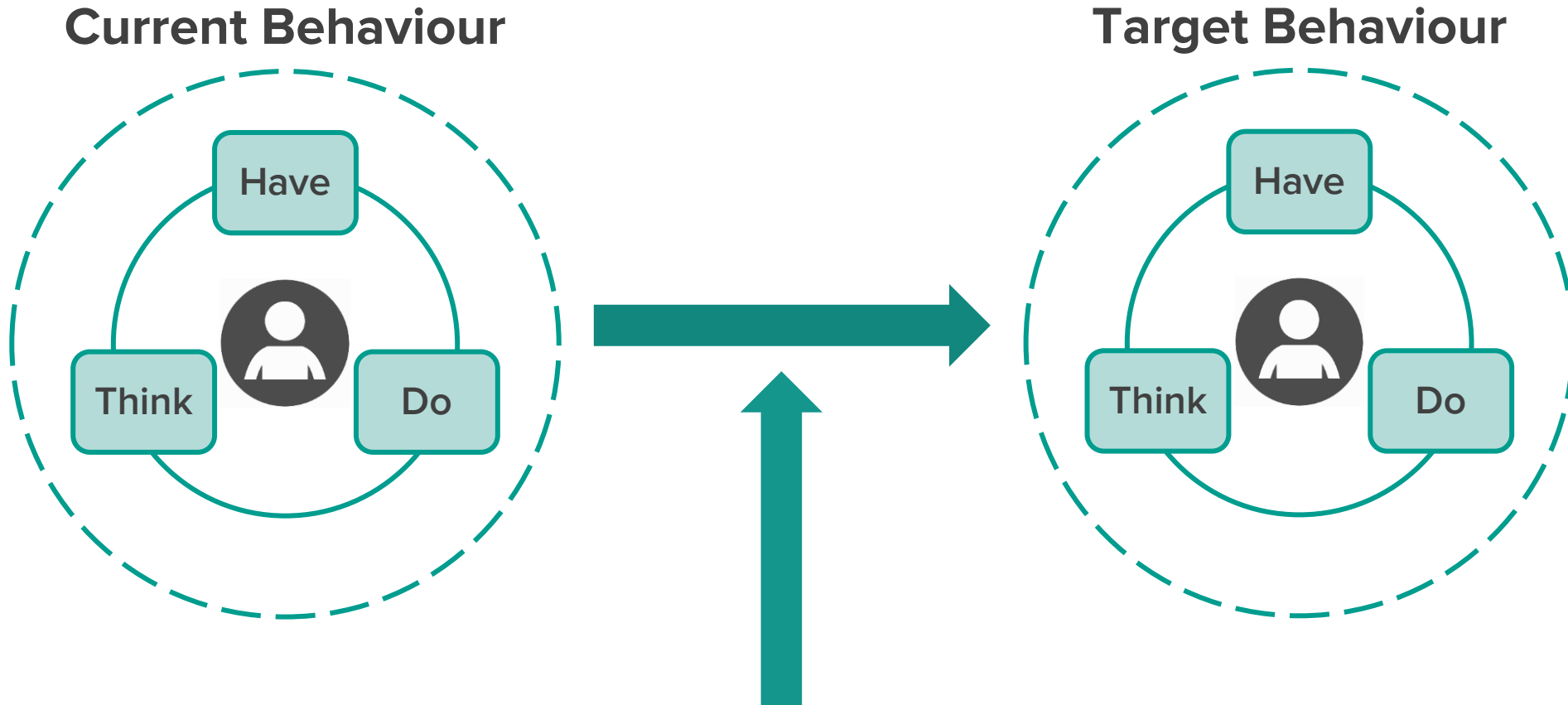
REUSE cups and bottles when you drink coffee and water.



RECYCLE and compost by sorting your waste.



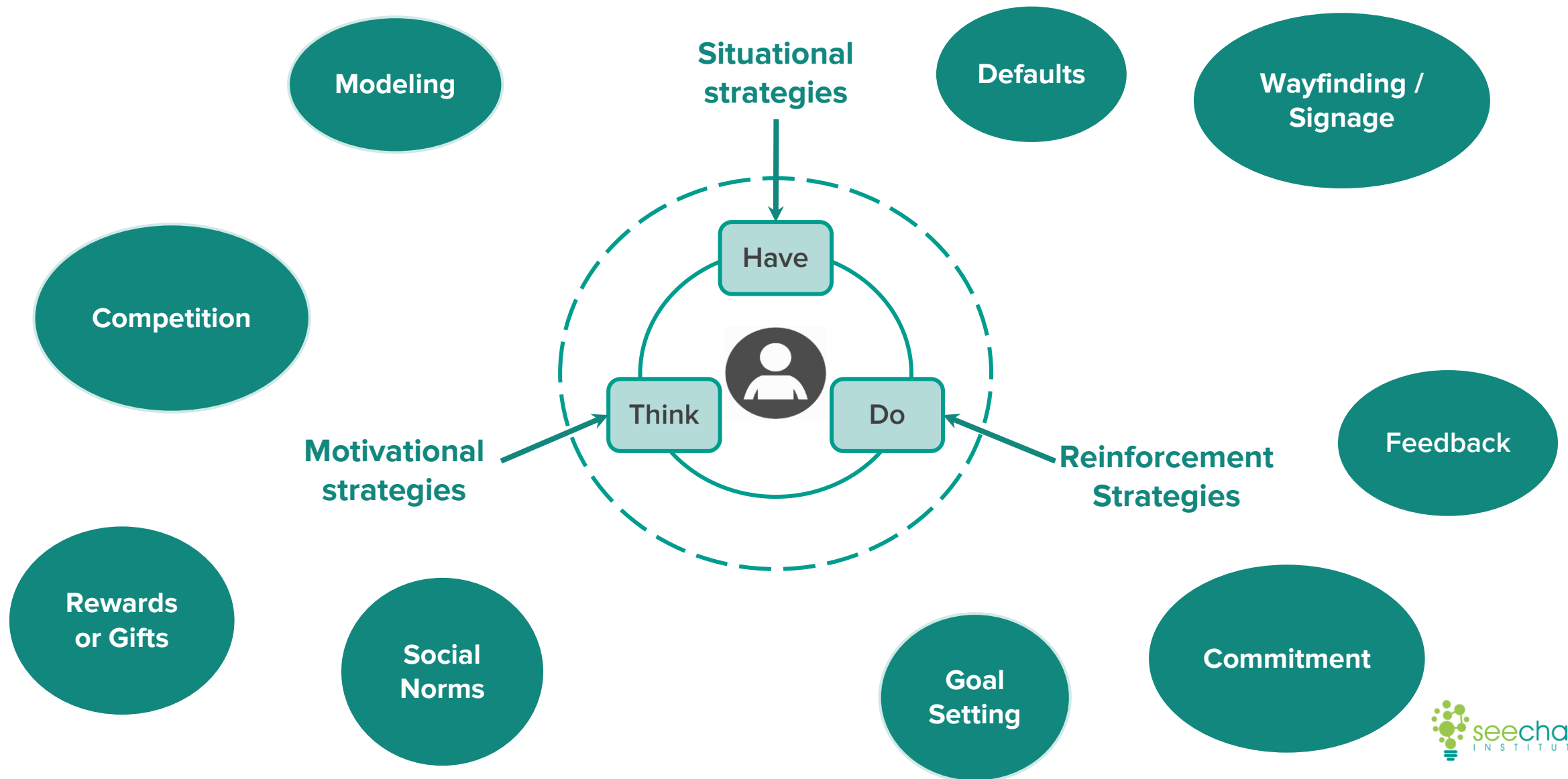
Content and Delivery



Your Program Here

Change what people do by addressing barriers in terms of what they have, think, know, or by changing the context

Link Strategies to Barriers



Case Study: Step Up and Power Down



Kickoff

**Waste
Week**

**Energy
Week**

**Water
Week**

**Take It Home
Week**

**HVAC
Week**

**Celebration
Week**



**Take the
pledge**

**Learn to
sort
waste**

**Test
energy
vampires**

**Encourage use
of reusable
cups/bottles**

**Shutdown
facilities for
the holidays**

**Collect
feedback
on comfort**

**Celebrate
the
campaign**

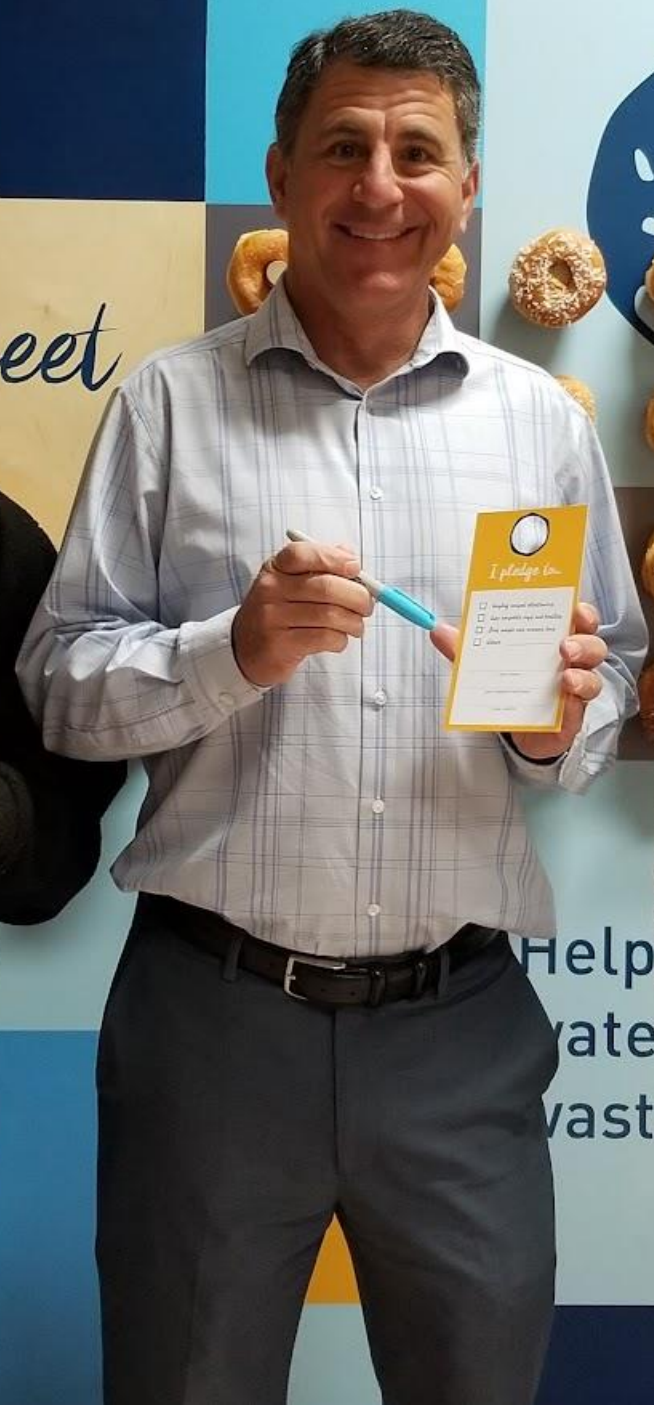
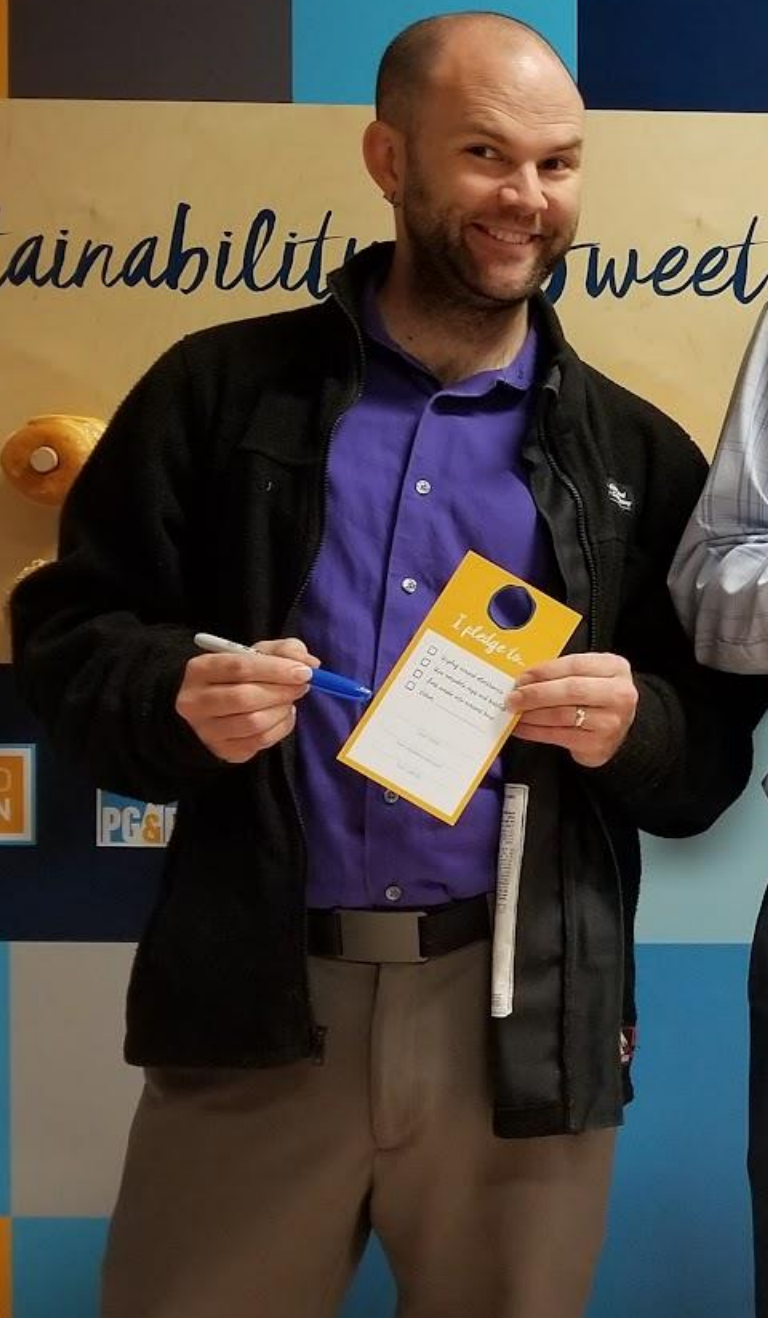
Sustainability is sweet



STEP UP AND
POWER DOWN



Help
save
waste



Case Study: Step Up and Power Down



Email



Event



Dashboard



Drawing



Quiz

Testing, Testing



UX Testing

Prototyping

Qualitative

Hypothesis generation



A/B Testing

Pretotyping

Quantitative

Hypothesis testing

Case Study: Business Energy Reports (BERs)

Personalization

UTILICO
P.O. BOX 1234 SPRINGFIELD CA 98765 4321

November 5, 2014

Energy Check
Reporting period: **Sept-Oct 2014** Account #: **1**
Report for: **FAIRHAVEN HOTEL**
2041 5TH AVE
SACRAMENTO, CALIFORNIA

Find Energy Check online at: utilico.pulseenergy.com

ATTN: HOTEL MANAGER
PULSECHECK UTILICO
739299 1ST AVE
NEW YORK NY 10010

Hotels

Energy performance timeline
Are you using **↑MORE** or **↓LESS** energy than the average of hotels with similar characteristics?

Apr 2014	May 2014	June 2014	July-Aug 2014	Sept-Oct 2014	Nov-Dec 2014
\$867 ↑MORE	\$382 ↑MORE	\$119 ↑MORE	\$26 ↑MORE	\$292 ↑MORE	?

Total to date: **\$1,686 ↑MORE**

Trend
Fairhaven Hotel (solid line), Similar hotels (dashed line)
It appears your hotel is maintaining **consistent energy efficiency**. See the next page for ways to save.

Designed with your small business in mind
The Utilico Business Solutions Program makes it simple and affordable to reduce energy use and save money. Eligible businesses will receive:

- A free facility assessment by an approved contractor
- A report outlining energy saving opportunities and costs
- Installation of energy efficient equipment
- Up to \$10,000 in incentives

To learn more, call 1-888-555-4322 and ask for the **Business Solutions Program**.

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Feedback

Social Norms

Identity

FOCUS ON Heating

Cost of heating:

- You currently spend about **\$7,100/year** on electricity and natural gas for heating.
- Heating costs come from equipment such as: furnaces, space heaters, boilers, and heatpumps.

More efficient heating:

- Requires less maintenance
- Reduces peak demand
- Increases occupant comfort
- Reduces downtime
- Requires less space in mechanical rooms

Heating 14% of your annual energy costs

We've analyzed your hotel's energy use and recommend the following actions:

Programmable thermostats

You don't need to heat your building the same when it is unoccupied. At night, **lower the thermostat 7-10°F** from its normal setting.

If you can do this 8 hours per day, you will **save as much as 10%** on your heating costs.

Consider installing a **7-day programmable thermostat** if you don't currently have one.

NEXT STEP: Adjust your thermostat set points.

How-to guide available
Details at utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$680/YEAR

Maintain heating system

Regular maintenance of the heating system will **increase its energy efficiency** and your comfort.

Have a **licensed HVAC contractor** check your heating and duct system for leaks.

Sealing and insulating ducts can improve the efficiency of your heating system by 2%.

NEXT STEP: Contact an HVAC contractor.

Rebates available
Details at utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$130/YEAR

Variable speed drives

Ventilation systems do not normally require that fans operate at **full speed** at all times. Consider adding variable speed drives (VSDs) to fan motors.

VSDs match fan speed to the **actual requirements** at different times of the day. They can reduce your ventilation electricity use by \$172 per hp of fan size.

NEXT STEP: Contact your equipment supplier.

Rebates available
Details at utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$1,000/YEAR

NEXT REPORT Maintenance
Want to lower your bill without upgrading costly equipment? In your next report, learn more about energy-saving equipment maintenance.

In your mailbox: Jan 2015

Icons

Photos

Gain/Loss Framing



Case Study: Business Energy Reports (BERs)



More efficient water heating can:

- Lower peak demand
- Reduce downtime
- Improve safety
- Minimize standby
- Waste less water

ENERGY STAR water heaters...

Save up to 10% on your bill.

NEXT STEP: Purchase low-flow showerheads and faucets.

Rebate available

CUT ENERGY COSTS BY UP TO **\$140** YEAR

In your mailbox: **June 2015**

seechange INSTITUTE

Icons

Photos

Gain/Loss Framing



Case Study: Business Energy Reports (BERs)

“It would be helpful to have someone show me what I can change here.”

“I just scan this and then throw it out. Sorry.”

More efficient water heating cans:

- Lower peak demand
- Reduce downtime
- Improve safety
- Minimize standby energy loss
- Waste less water

ENERGY STAR water heaters:

They are **25% more energy efficient** than conventional commercial units.

These savings apply to both tank and tankless (instantaneous) models.

Residential ENERGY STAR water heaters are **also available** for lighter uses.

NEXT STEP: Purchase a qualified water heater specialist.

Rebate available: Details at www.pge.com/berrebates

CUT ENERGY COSTS BY UP TO \$140/YEAR

More efficient water heating cans:

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- Reduce downtime
- Improve safety
- Minimize standby energy loss
- Waste less water

Hot water: 6% of your annual energy costs

ENERGY STAR water heaters:

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Residential ENERGY STAR water heaters are **also available** for lighter uses.

NEXT STEP: Consult a qualified water heater specialist.

0% financing: Details at www.pge.com/berref

CUT ENERGY COSTS BY UP TO \$350/YEAR

Showerheads and faucets:

Low-flow showerheads and faucets **reduce water use**, without sacrificing performance.

They are **inexpensive, easy to install**, and not only save water, but **also the energy** needed to heat the water.

Save up to **10%** on your hot water bill.

NEXT STEP: Purchase low-flow showerheads and faucets.

CUT ENERGY COSTS BY UP TO \$140/YEAR

Insulate hot water system:

Save up to **10%** on your water heating costs by insulating your hot water tank and pipes.

Proper insulation **minimizes standby heat loss**, which means water does not need to be brought up to temperature as frequently.

Insulation is **especially helpful** if your tank is kept in a cooler location, such as a basement.

NEXT STEP: Purchase a pre-cut jacket or blanket.

Rebate available: Details at www.pge.com/berrebates

CUT ENERGY COSTS BY UP TO \$140/YEAR

Closed hours: Cutting energy waste during closed hours is a great way to save money without impacting your business. **Learn more in your next report.**

0% financing: Details at www.pge.com/berref

CUT ENERGY COSTS BY UP TO \$350/YEAR

ENERGY STAR equipment: Buy ENERGY STAR® qualified appliances

Buying ENERGY STAR® qualified appliances helps you create a cleaner environment.

Upgrade cooking equipment:

ENERGY STAR equipment like steamers, griddles, ovens, and fryers are up to **17% more energy efficient** than standard models.

NEXT STEP: Prepare a maintenance schedule for your cooking equipment.

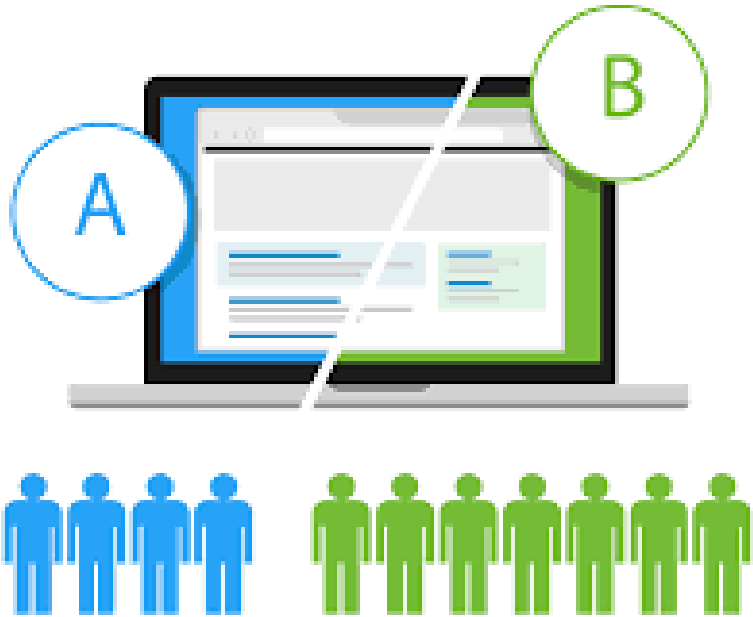
CUT ENERGY COSTS BY UP TO \$300/YEAR


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0% financing: Details at www.pge.com/berref

CUT ENERGY COSTS BY UP TO \$350/YEAR

Case Study: Business Energy Reports (BERs)






FOCUS ON Heating

Heating

14%

of your annual energy costs





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<p>How-to guide available <small>Details at utilico.pulseenergy.com</small></p>	<p>\$ Rebates available <small>Details at utilico.pulseenergy.com</small></p>	<p>\$ Rebates available <small>Details at utilico.pulseenergy.com</small></p>
<p>CUT ENERGY COSTS BY UP TO</p> <p>\$680 /YEAR</p>	<p>CUT ENERGY COSTS BY UP TO</p> <p>\$130 /YEAR</p>	<p>CUT ENERGY COSTS BY UP TO</p> <p>\$1,000 /YEAR</p>

NEXT REPORT

Maintenance

Want to lower your bill without upgrading costly equipment? In your next report, learn more about energy-saving equipment maintenance.

 **In your mailbox:**
Jan 2015


Icons

Photos

Gain/Loss Framing

UTILICO

Reenergy, the NDC — © 2014, ENDC, Inc. The comparisons and savings displayed here are calculated for typical premises in the US based on area and year actual and up only way. Utilico and Reenergy, Inc. have organized the provided energy savings. They do not represent any recommendation.



Case Study: Business Energy Reports (BERs)

Lighting maintenance



Make sure that bulbs, fixtures, lamps, and reflective surfaces are **cleaned regularly**.

By removing dust and grease, you can **increase the output** of your lights. Without maintenance, light levels can fall by more than 50% in 2-3 years.

A basic maintenance program can reduce lighting electricity costs **by up to 15%**.

Lighting maintenance




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Case Study: Business Energy Reports (BERs)

Programmable thermostats




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NEXT STEP:
Adjust your thermostat set points.

SAVE UP TO

\$1,200 YEAR

Programmable thermostats



You don't need to heat your building the same when it is unoccupied. At night, **lower the thermostat 7-10°F** from its normal setting.

NEXT STEP:
Adjust your thermostat set points.

CUT ENERGY COSTS BY UP TO

\$1,200 YEAR

Case Study: Business Energy Reports (BERs)



Save up to \$1.50 per tube

Contact your utility for more information



Rebates available

Contact your utility for more information

Use fans more & A/C less



Ceiling Fans



More at: <http://homeenergy.org/show/blog/id/917/>

Case Study: Business Energy Reports (BERs)

Personalization

UTILICO
P.O. BOX 1234 SPRINGFIELD CA 98765 4321

November 5, 2014

Energy Check

Reporting period: **Sept-Oct 2014** Account #: **1**

Report for: **FAIRHAVEN HOTEL**
2041 5TH AVE
SACRAMENTO, CALIFORNIA

Find Energy Check online at:
utilico.pulseenergy.com

ATTN: HOTEL MANAGER
PULSECHECK UTILICO
739299 1ST AVE
NEW YORK NY 10010

HOTELS

Energy performance timeline

Are you using **↑MORE** or **↓LESS** energy than the average of hotels with similar characteristics?

Apr 2014	May 2014	June 2014	July-Aug 2014	Sept-Oct 2014	Nov-Dec 2014	Total to date
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↑MORE	↑MORE	↑MORE	↑MORE	↑MORE	?	↑MORE

Trend

— Fairhaven Hotel — Similar hotels

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utilico.pulseenergy.com 1-888-555-4322

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Feedback

Social Norms

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We've analyzed your hotel's energy use and recommend the following actions:

Programmable thermostats

You don't need to heat your building the same when it is unoccupied. At night, **lower the thermostat 7-10°F** from its normal setting.

If you can do this 8 hours per day, you will **save as much as 10%** on your heating costs.

Consider installing a **7-day programmable thermostat** if you don't currently have one.

NEXT STEP: Adjust your thermostat set points.

How-to guide available
Data at: utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$680/YEAR

Maintain heating system

Regular maintenance of the heating system will **increase its energy efficiency** and your comfort.

Have a **licensed HVAC contractor** check your heating and duct system for leaks.

Sealing and insulating ducts can improve the efficiency of your heating system by 2%.

NEXT STEP: Contact an HVAC contractor.

Rebates available
Details at: utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$130/YEAR

Variable speed drives

Ventilation systems do not normally require that fans operate at **full speed** at all times. Consider adding variable speed drives (VSDs) to fan motors.

VSDs match fan speed to the **actual requirements** at different times of the day. They can reduce your ventilation electricity use by \$172 per hp of fan size.

NEXT STEP: Contact your equipment supplier.

Rebates available
Details at: utilico.pulseenergy.com

CUT ENERGY COSTS BY UP TO \$1,000/YEAR

NEXT REPORT Maintenance

Want to lower your bill without upgrading costly equipment? In your next report, learn more about energy-saving equipment maintenance.

In your mailbox: Jan 2015

UTILICO Providing the NOC — © 2014 EnerNOC, Inc. The comparisons and savings displayed here are calculated for typical premises in the US based on area and year actual load up to 10/31/14. Utilico and EnerNOC, Inc. do not guarantee the amount of energy or savings. They solely represent the recommended actions.

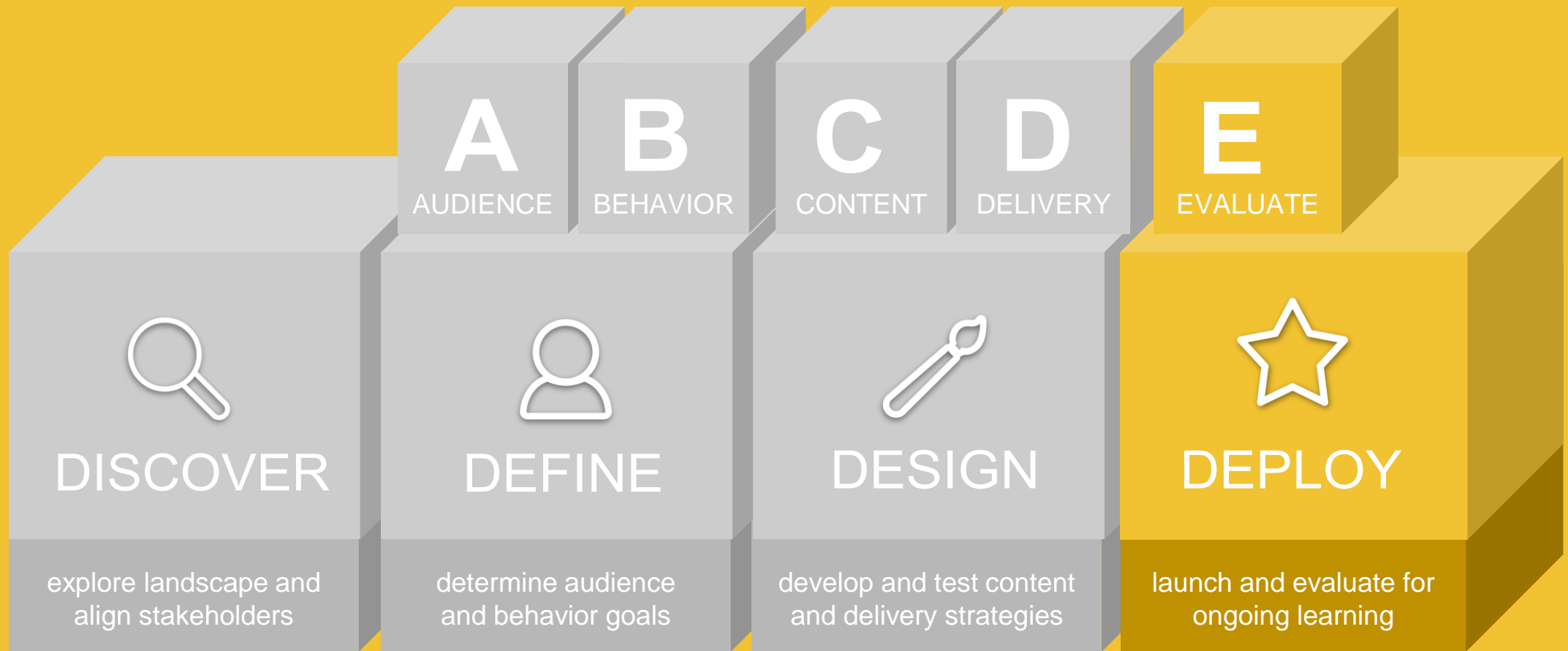
Icons

Photos

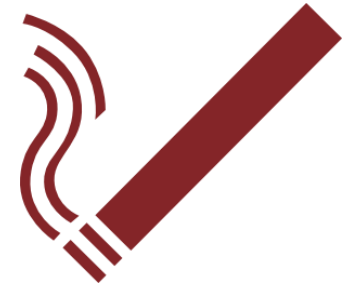
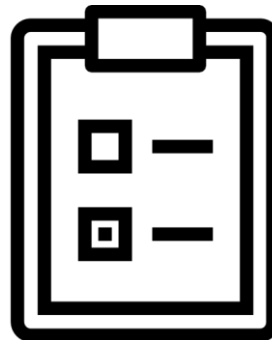
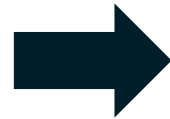
Gain/Loss Framing





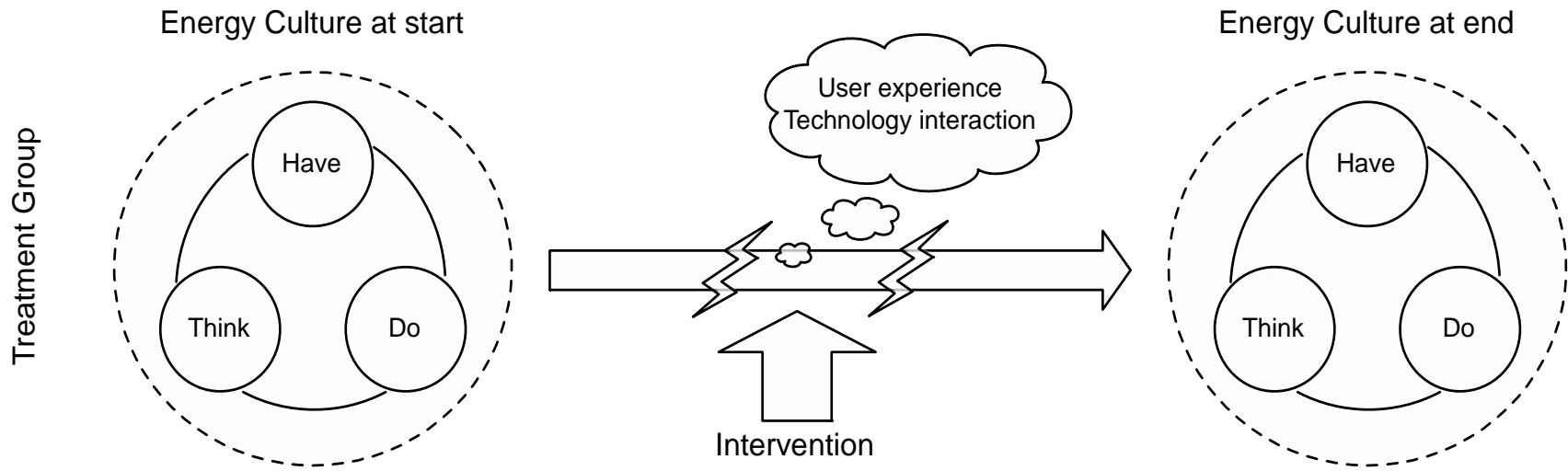
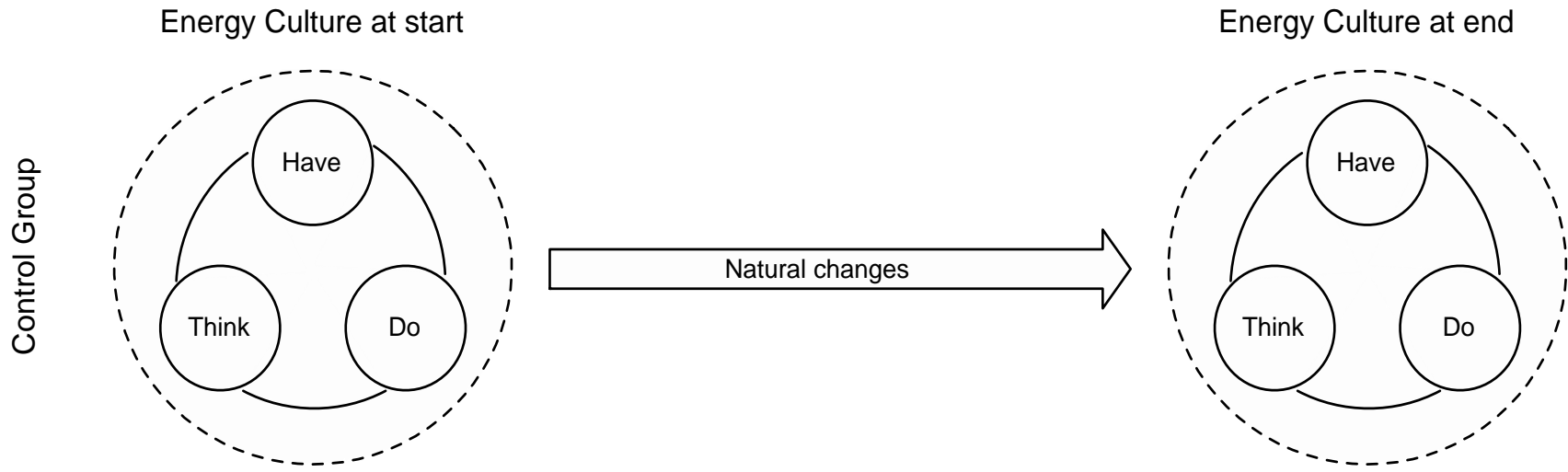


The Importance of Asking Questions

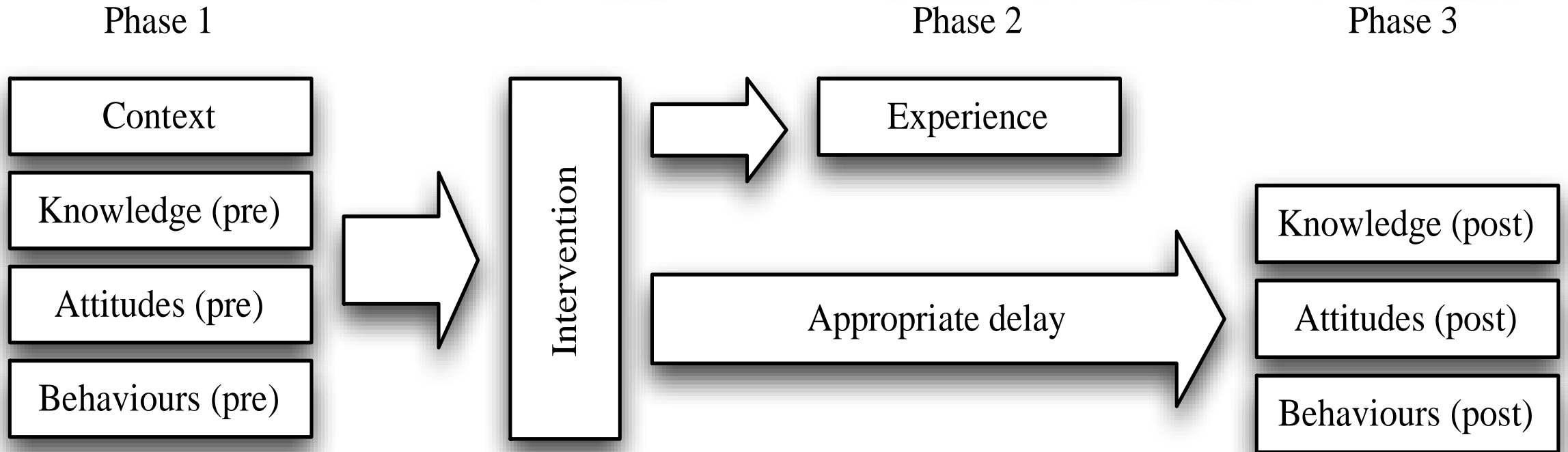


Everett, Hayward, & Scott (1974). The effects of a token reinforcement procedure on bus ridership. *Journal of Applied Behavioral Analysis*, 7, 1-9.

Evaluation Beyond kWh



Evaluation Beyond kWh



Types of Metrics

Descriptive

What happened?

(e.g. attendance, call volume, website visits)

Perception

What did people think about what happened?

(e.g. ratings, surveys, Customer Satisfaction (CSAT))

Outcome

What happened as a result of what happened?

(e.g. sales, energy/cost savings, customer retention)

Case Study: Step Up and Power Down

Goal 1

Employee engagement

- Qualitative employee feedback
- Enrolment Data
- Campaign Feedback Survey

Goal 2

Increases in knowledge
Changes in attitude
Sustainable behaviour

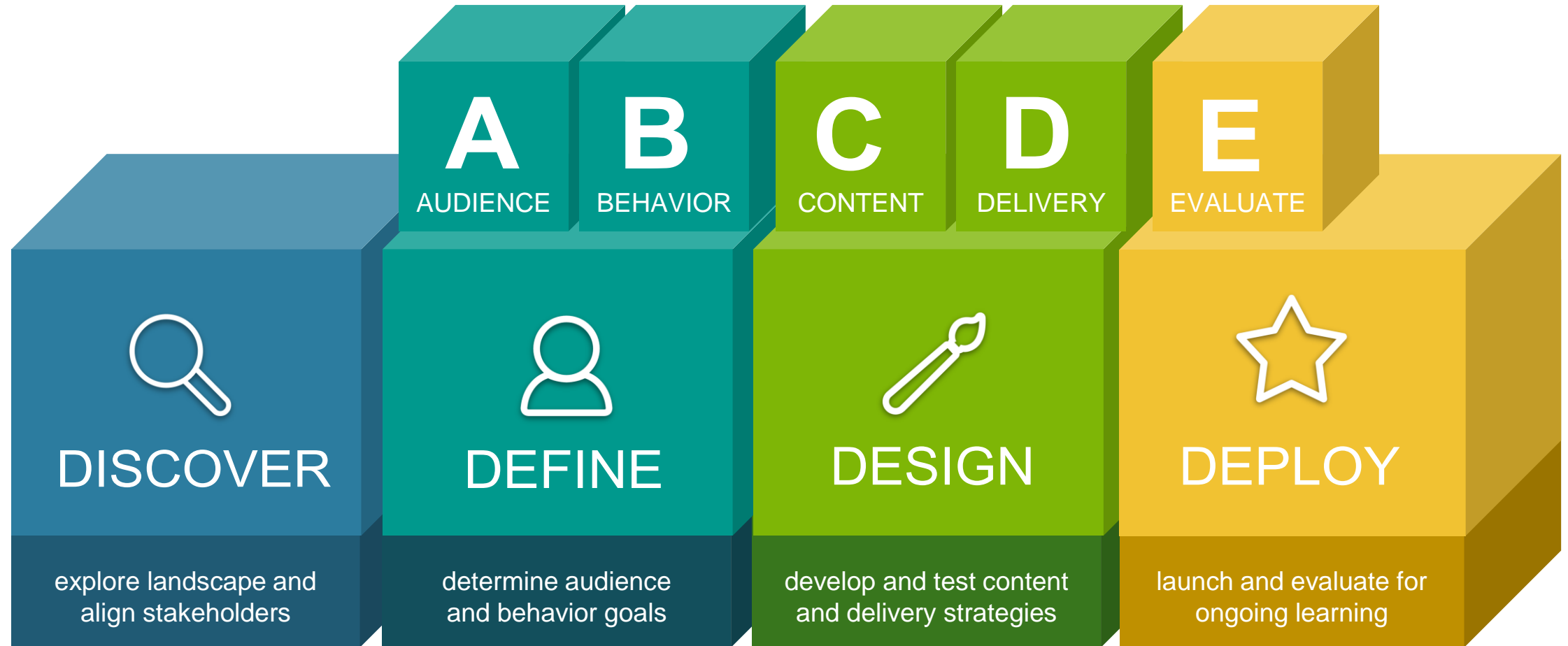
- Pre-Post Tests
(1 week pre, 1-month post)
- Weekly observational walkthroughs

Goal 3

Decrease in resource use

- Meter and purchasing data

The Building Blocks of Behavior Change





Thank you!



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