



Social Marketing How-To Guide for Shore Friendly Campaign Implementers

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Project Background

The Puget Sound Marine & Nearshore Grant Program, co-led by Washington Departments of Fish and Wildlife and Natural Resources, funded this project with the goal of reducing the total amount of traditional “hard” armor along Puget Sound marine shorelines. This can be accomplished by a combination of reducing new armor and removing existing armor. Hard armor refers to structures placed on the upper beach and at the toe of bluffs typically to reduce erosion, and is referred to using a variety of terms in the Puget Sound region, including the terms bulkhead, seawall, revetment, and rockery. Armor has been associated with numerous negative impacts the Puget Sound nearshore. The *Social Marketing Strategy to Reduce Puget Sound Shoreline Armoring* project describes how we can overcome barriers and motivate residential landowners to voluntarily choose alternatives to hard armor.

This project team has used social marketing principles to research and design a program that will help reduce the amount of hard armor along Puget Sound marine shorelines. It resulted in:

- A Sound-wide GIS database of residential marine shore properties, including audience segmentation based on shore characteristics, and prioritization based on high value shoreforms and habitats with documented ecological impacts from shore hardening
- Descriptions of priority segments in terms of size, demographics and additional parcel data
- Desired audience behaviors for each segment
- Prioritized list of barriers and motivations for each desired armoring behavior
- Social marketing strategies and interventions to encourage the desired behaviors
- Toolkit for stakeholders to use in implementing social marketing campaigns in Puget Sound
- Detailed evaluation plan and report that details all project findings

The goal for this project is to create a social marketing behavior change strategy designed to influence priority segments of residential shoreline landowners to make behavior changes related to shore armor in order to achieve grant program goals. The strategy focuses on realistic approaches that use research-based incentives to overcome the specific barriers to reducing shore armor among key target audience segments.

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Introduction

This workbook explains how grantees throughout Puget Sound can use social marketing theory and the Shore Friendly campaign to enhance their shoreline armor reduction outreach efforts. This step-by-step guide includes how-to instructions to walk you through the social marketing planning process, as well as worksheets to fill in as you develop your campaign plan. Whether you are starting a new campaign or looking for tools to add to an existing effort, Shore Friendly's social marketing approach can help you successfully target shoreline landowners for behavior change and reduce shore armor.

While each of these steps may vary depending on your particular project, we recommend that you read the entire workbook prior to getting started to get a full picture of all that's involved in planning and executing a successful social marketing campaign. The planning process steps outlined in this workbook are as follows:

- Step 1:** What Is Success: Identifying Goals and Objectives
- Step 2:** Stop, Look and Listen: Defining Your Research Needs
- Step 3:** The What: Shore Friendly Behavior Changes
- Step 4:** The Who: Finding and Segmenting Your Target Audience
- Step 5:** The How: Planning Your Intervention
- Step 6:** What's the Hook: Creating Effective Messaging
- Step 7:** Who Else Can Help: Finding Partnership Opportunities
- Step 8:** Making it Happen: Implementing Your Plan
- Step 9:** How Will You Know When You Get There: Creating an Evaluation Plan

What is Social Marketing?

Social marketing is a process that uses marketing principles and techniques to influence behavioral change in target audiences that will benefit society as well as individuals. It uses communications activities and more to influence behaviors for good. It is different from traditional marketing in that it focuses on changing behaviors rather than selling products and requires measurable behavioral change outcomes.

Many of the strategies and tactics deployed in social marketing campaigns are similar to what people have used for years in traditional marketing efforts. The difference is that social marketing focuses on changing a specific behavior by overcoming the barriers to that behavior, providing desired benefits and then measuring whether the social marketing efforts have made an impact.

Social marketing has been used for decades in the public health arena. More recently, it has started to be adopted for environmental issues.

Changing shoreline armor behaviors is a perfect challenge for a social marketer. In developing the Shore Friendly campaign, we have identified the key information, decision points, tools and incentives to help people overcome their barriers to changing their shoreline armor behaviors.

Step 1: What Is Success: Identifying Goals and Objectives

Identifying your campaign's goals and objectives is the most important step in the community-based social marketing (CBSM) planning process. Goals and objectives should guide everything you do. Make sure you have internal alignment within your organization about your goals and objectives so that your team and management are in agreement about what you are trying to accomplish.

- What do we want our social marketing campaign to accomplish?
- How will our success be measured?

Clear definition will allow you to make smart decisions about your marketing strategies and tactics, as well as make efficient use of your resources. Keep in mind that you may also need to do some baseline research (using methods outlined in Step 2) to fully understand which goals and objectives are the most appropriate and realistic for your program.

Goals are what you want to accomplish for your marketing program, and objectives are how you will get there.

- *Goals* are long-term and broad, e.g., reduce shoreline armor in our county by 10% in 10 years.
- *Objectives* in social marketing are focused on specific and measurable behaviors and should tie directly to one or more of your goals, e.g., have 1,000 homeowners apply for an erosion assessment in one year.

Tips:

- Create one goal that addresses your overall marketing program success: What does success look like two, five or ten years from now?
- Goals should tie into the overall Shore Friendly mission.
- There is no set number of behavior objectives; determine what is needed to help you reach your goal.
- Be realistic about your expectations; don't aim too high or too low.
- Make sure you have a way to measure each behavior objective.
- Objectives aren't set in stone. They may end up changing over time as you work through the steps, and even as you implement your program.

Step 2: Stop, Look and Listen: Defining Your Research Needs

In developing the Shore Friendly campaign, our team has undertaken extensive research on shoreline properties and property owners including:

- Developing a database of Puget Sound Shoreline Parcels that identifies shore armor status, geomorphic shoretype, forage fish habitat data and more (Task 2A: Puget Sound Shoreline Parcel Segmentation Report)
- A Puget Sound Shoreline Parcel Owner Characteristics Report drawn from the parcel database and voter registration data (Task 2B: Puget Sound Shoreline Parcel Owner Characteristics Report)
- Property Owner Interviews discussing shore armor behaviors (TASK 4B: Landowner Interviews)
- Influencer Interviews with people that may sway shoreline modification decisions (TASK 4B: Influencer Interviews)
- Literature Review of current and past research, case studies, public opinion polling and reports related to residential shoreline armor behavior (TASK 4C: Barriers and Motivations Literature Review)
- Survey of Shoreline Property Owners including questions about people's property, their concerns, their experiences with managing the shoreline, as well as their awareness of behaviors and choices that could impact the health of their shoreline's habitat. (TASK 4D: Survey of Shoreline Property Owners)
- Shoreline Property Owner Focus Groups to test and refine Shore Friendly campaign messaging and tools with members of our target audiences. (Task 5B: Shoreline Armor Focus Group Findings)
- Influencer Survey to gather feedback on proposed Shore Friendly tools and messaging from people who work with shoreline landowners including permitting, education and resource management staff, NGOs and consultants or contractors. (Task 5C Influencer Survey Results)

Before undertaking your own campaign, we highly recommend reviewing the entirety of our report: *Social Marketing to Reduce Shoreline Armoring*. In addition, we recommend that you use the Soundwide Parcel Database developed as part of this project to help identify key audiences and specific properties to target in your campaign area. Access to the database can be provided by request through WA Department of Fish and Wildlife and WA State Department of Natural Resources.

Throughout this how-to guide, we will introduce you to many of our key findings, but there may be knowledge gaps specific to your jurisdiction that you need to fill through research of your own. Remember: Don't assume that YOU know how your audience thinks and feels or that YOU are the audience—the results of the research need to guide program development.

Choosing the Right Research

It is important to note that different research techniques have different levels of investment. Email or phone surveys, targeted interviews and diaries can be a cost-effective way to gain information. More

involved techniques such as focus groups can be more expensive, so make sure you are conscious of your budget when creating your research plan. If you have a limited research budget, low-cost methods can still provide valuable insight. Picking the right research for your needs is a key step in your planning process:

Type of research	How it is used	Things to consider
Quantitative surveys (telephone, online or mail)	<ul style="list-style-type: none"> • To gather statistically significant data about your audience such as who they are and how they think, feel and act • To gather baseline data for evaluation and tracking 	<ul style="list-style-type: none"> • The emergence of caller ID and increased cell phone use is making it harder to get representative samples from telephone surveys. • Include a series of screening questions up front to ensure you are gathering data from your target audience. • Online surveys self-select people more comfortable with computers, though depending on your target audience, this could be okay. • Online surveys have the advantage of allowing you to show visual items.
Focus Groups	<ul style="list-style-type: none"> • To test messages • To test creative concepts • To delve deeper into audience values and motivations 	<ul style="list-style-type: none"> • One vocal participant can lead the whole group. You can get around this by incorporating some exercises where you have participants write down their initial reactions or thoughts to items you want to test before you open it up for group discussion. • You will need to offer incentives for participation; the bigger the incentive, the less time you will need to spend on recruitment.
Intercept surveys (one-on-one surveys at malls, parks, etc.)	<ul style="list-style-type: none"> • To test messages • To test creative concepts 	<ul style="list-style-type: none"> • You need to keep surveys short—five to ten minutes. • Go to locations where your target audience gathers.
Behavioral observation (in person or via video surveillance)	<ul style="list-style-type: none"> • To learn the specifics of how your audience is doing the behavior you want to change 	<ul style="list-style-type: none"> • If your campaign is behavior-based, observation is a great way to get insight into how your target audience behaves.
Executive interviews (in person or via phone)	<ul style="list-style-type: none"> • To gather input from influencers on program design and marketing strategies 	<ul style="list-style-type: none"> • You can use these interviews as an opportunity to brief key participants about your efforts, as well as gather information.
Diaries (target audiences keep a diary of their behaviors and feelings)	<ul style="list-style-type: none"> • To determine behaviors, as well as the barriers and motivations for changing a behavior 	<ul style="list-style-type: none"> • Try to design a methodology so that it is not obvious what you are trying to figure out. You can do this by having them track their behaviors and thoughts around several activities rather than just what you are interested in.

Step 3: The What: Shore Friendly Behavior Changes

Identifying target behaviors for social marketing campaigns requires prioritizing behavior changes based on:

- Impact: the scale of the environmental good brought about by the behavior
- Probability: the likelihood of people to change their behavior
- Penetration: the number of people not doing currently doing the behavior

The Shore Friendly campaign is focused on eleven behaviors that have been prioritized according to their feasibility for landowners and their potential to address the ultimate goal of reducing the amount of hard armor along Puget Sound residential marine shorelines. The eleven behaviors are sorted into two groups: primary behaviors directly related to shoreline armor and supporting behaviors that are good for shorelines, but don't necessarily lead to the goal of no net increase in hard armor along Puget Sound shorelines. A full explanation of behavior ranking can be found on page 9 of Task 3: Identifying Behaviors and Mapping Decisions to Reduce Shoreline Armor.

Primary behaviors

Primary behaviors contribute directly to preventing a net increase in hard armor along shoreline properties.

1. Leave shore unarmored
2. Remove all hard armor
3. Remove a portion of hard armor
4. Replace armor with soft shore protection

Supporting behaviors

Supporting behaviors, when implemented properly, can reduce the actual and perceived need for installation of shore armor through minimizing erosion and the initiation of landslides. These measures can head off erosion/landslide events that often trigger landowners to install armor.

- 1. Maintain native vegetation (trees, shrubs, groundcover, backshore)**
Maintaining native vegetation ensures that the shore is protected from erosion by strong root systems and preserves shoreline habitats for fish and wildlife. Maintaining original native vegetation is superior to clearing and planting, as original topsoil and root structure are more resilient to erosion and drought, and provide denser vegetation for habitat.
- 2. Plant native vegetation (trees, shrubs, groundcover, backshore)**
Planting additional native vegetation enhances protection of the shore from erosion by improving strong root systems and preserves shoreline habitats for fish and wildlife.
- 3. Reduce surface water runoff reaching bluffs**
Surface water runoff reaching bluffs can cause increased erosion and undermine other shoreline protection measures that are already in place.
- 4. Build with a generous setback (further from shoreline than current regulations require)**

Building further from the shoreline than required can mitigate risk to structures from erosion and also protects structures from future sea level rise. This is the most effective and long lasting secondary measure for avoiding and need for armor in the future.

5. Install soft shore protection on unarmored property

Soft shore protection on unarmored property is recommended only as a preferable alternative to hard armor when shoreline protection is deemed necessary, such as during the development of a substandard sized property.

6. Move home further from the shoreline

Moving homes further from the shoreline can mitigate risk to structures from erosion and also protects structures from sea level rise permanently.

7. Obtain professional advice

Advice from professionals with knowledge of hard armor alternatives and realistic erosion risks will point shoreline property owners towards solutions (including no action, if appropriate) with the best long term results for their property and shoreline health.

Step 4: The Who: Finding and Segmenting Your Target Audience

Target audiences are individuals or groups of community members that your program needs to influence in order to change consumer behaviors. These audiences will play a number of roles in your social marketing campaign's success.

Primary Audiences

The Primary Audience for the Shore Friendly campaign is owners of residential shoreline parcels in the Puget Sound. Research indicated the following characteristics for shoreline properties and their owners:

Property Characteristics

- 80% of shoreline properties have a home on the property. The homes tend to be older (built pre-1980). (source: Task 2A: Puget Sound Parcel Segmentation Report, Task2B: Puget Sound Shoreline Parcel Owner Characteristics Report)
- There is a near even split between properties with and without shoreline armor. 48% shoreline properties do have armor, 52% do not. If a home is present on the property, it is more likely to have shore armor. (source: Task 2A: Puget Sound Parcel Segmentation Report)

Owner Demographic Characteristics

- 46% of parcels with a home are owner-occupied. (source: Task 2B: Puget Sound Shoreline Parcel Owner Characteristics Report)
- For those who do not live at their property, 22.1% live elsewhere in the county, 30.1% live elsewhere in Washington State, 8.3% live out of state, and 1% live out of the US. (source: Task 2B: Puget Sound Shoreline Parcel Owner Characteristics Report)
- While there is a range of annual household incomes, 41% have an annual income of more than \$125K and 36% have incomes of between \$60K and \$124K. (source: Task 4D: Survey of Shoreline Property Owners)
- Have owned their shoreline property long term (source: Task 2B: Puget Sound Shoreline Parcel Owner Characteristics report)
- Are college educated (81% have a college degree) (source: Task 4D: Survey of Shoreline Property Owners)
- The decision-maker regarding shoreline protection tends to skew male (source: Task 4B: Landowner Interviews , Task 4C: Literature Review)
- 58% are older than age 65 and many are retired (59%) (source: Task 4D: Survey of Shoreline Property Owners)

Owner Psychographics Characteristics:

Shoreline property owners tend to:

- Think Puget Sound is in good health (source: Task 4C: Literature Review)
- Have a personal/emotional connection to their land and Puget Sound (source: Task 4C Literature Review, Task 5B: Shoreline Armor Focus Group Findings, Task 5C: Influencer Survey Results)
- Strongly believe that shorelines should be protected for future generations (source: Task 4B: Landowner Interviews, Task 4C: Literature Review)
- Want to do the "right" thing but don't know what that is in terms of shorelines and shoreline armor (source: Task 4C: Literature Review and Task 5B: Shoreline Armor Focus Group Findings)
- Have strong voting habits (source: Task 2B Puget Sound Shoreline Parcel Owner Characteristics Report)
- Shoreline property owners are hungry for more information about how to manage their shorelines responsibly and have both a desire and capacity for detailed information. (source: Task 5B: Shoreline Armor Focus Group Findings and Task 5C: Influencer Survey Results)

Target Audience Barriers and Motivations

Beyond understanding the demographics and psychographics of the audience, it is crucial to understand the barriers and motivations that relate to the behaviors you want the audience to take. Social marketing campaigns live and die by their ability to understand and address the barriers and motivators of the target audience.

A barrier is anything that reduces the probability of a person engaging in the desired behavior. This includes both internal and external barriers.

Internal barriers are lack of knowledge or motivation, as well as perceptions or assumptions. Remember: your target audience's assumptions or perceptions might not be true at all—it's your job as a social marketer to correct those misunderstandings.

External barriers include factors like lack of access, the difficulty of the behavior, or the cost of the behavior.

Motivations are reasons why the audience changes its behavior. Effective social marketing campaigns define and target the specific barriers to each behavior and use specific motivations to overcome those barriers.

For the Shore Friendly campaign, there are three primary audience categories among shoreline land owners based on desired behavior changes and common corresponding barriers and motivations:

- Category 1: Properties without Armor
- Category 2: Properties with potential for armor removal and/or replacement with soft shore protection
- Category 3: Properties where armor removal is generally less feasible

Category 1: Properties without Armor

Category 1 is made up of audience segments 1 through 4 (see page 8 table 1 of Task 5:

Social Marketing Approach and Campaign Implementation Tools for the Reduction of Puget Sound Shoreline Armor). These segments do not have existing armor and together make up approximately 52% of parcels. While some parcels in this category have homes and some do not, and their erosion potential ranges from none to high, they are all united by our target behavior to leave their shoreline unarmored.

Primary barriers for this category are:

- Concern with erosion
- Anticipation that storms, waves, or tides might change the shoreline

Primary motivators to maintain their unarmored status are:

- Belief that their unarmored property is sufficiently protected or enhanced by not having armor
- Natural look of shore created by not having armor
- Creating a healthy habitat for fish and wildlife by not having armor
- Tax breaks for not having armor
- Lower maintenance time and cost relative to armor

Recommendations

In general, regulation (Shoreline Master Programs and Critical Areas Ordinances) will address the target behavior for this category, since it is difficult (if not impossible) for landowners to get permits to build new shore armor in most cases. Due to this, Category 1 is not a first priority for social marketing efforts. However, this segment should be addressed to influence the social norm around shore armor and help property owners see armor as a negative property attribute. Influencing this social norm will also help to address the risk that members of this category will undertake “do-it-yourself” armor efforts outside of the permitting process.

Category 2: Properties with Potential for Armor Removal and/or Replacement with Soft Shore Protection

Category 2 is made up of members of segments 5 through 8 (see page 8 table 1 of Task 5: Social Marketing Approach and Campaign Implementation Tools for the Reduction of Puget Sound Shoreline Armor). These segments all have existing armor and make up approximately 46% of total parcels. Like Category 1, Category 2 is made up of a mix of parcels with homes and without homes. The erosion potential for Category 2 ranges from none to moderate. This category is united by our target behaviors related to reducing armor on their parcels by removing all existing armor, removing a portion of existing armor and replacing armor with soft shore protection.

Primary barriers for this category are:

- Concern with erosion
- The expense of removing armor

- The complicated nature of the regulatory and permitting process to remove armor

Primary motivators for this category are:

- Protecting or enhancing their property by removing armor
- Tax breaks for removing armor
- Loans, grants or reduced fees
- A streamlined permitting process
- Creating a health habitat for fish and wildlife
- If there were substantial changes in the erosion of their property
- If storms, waves or tides changed their shore or bluff
- Free expert advice without a sales focus

Recommendations

This category is the number one priority for social marketing efforts to reduce shoreline armor. While the call to action for every segment in this category is similar, the single segment representing the greatest opportunity is Segment 8, which is made up of armored parcels with low to moderate erosion potential that have homes on the property. Segment 8 alone makes up 38% of total shoreline parcels. Segment 5 (no home, no armor, no erosion potential) also represents a small, but excellent opportunity to capitalize on “low-hanging fruit.” While this segment represents just 0.4% of shoreline parcels (222 parcels total), since their properties have no erosion potential and no existing home, there are lower barriers to armor removal than there are for other segments in this category.

Category 3: Properties where Armor Removal is Not Recommended

Category 3 is made up only of parcels in Segment 9. This segment makes up the 1% of shoreline parcels that have existing armor, have a home on the property, and have high erosion potential.

While Category 3’s barriers and motivators are similar to Category 2, we recommend not targeting this segment when building social marketing campaigns for two reasons:

- Because of the high erosion potential of their parcel, some form of shoreline armor is more likely to be necessary than with other segments, which would make removing armor and replacing with alternatives an expensive and complicated process.
- There is a risk that using soft shore protection alternatives in this category will yield less than ideal erosion results. As a result, testimonials from members of this segment could negatively influence the perceptions of other segments that are more likely to have a positive experience with removing shore armor.

Influencer Audiences

To ensure that shoreline parcel owners receive quality advice when making shore armor decisions, people that will influence shoreline landowners as they make decisions about how to protect their property are crucial secondary targets for social marketing efforts. These key influencers and their ideal roles for helping reduce shoreline armor are:

- **Realtors:**
 - Discuss maintenance costs and upkeep of hard armor
 - Promote values of maintaining or restoring the natural shore
 - Encourage consultation of professionals and provide contacts

- **Neighbors:**
 - Encourage value of natural shore
 - Discourage adding armor
 - Point out that armor may negatively influence adjacent properties

- **Outreach Staff:**
 - Raise awareness that installation of armor results in progressive loss of beach area
 - Educate home owners about coastal processes and physical and ecological impacts of armor
 - Encourage actions that will leave shore in a natural state, the removal of existing armor and/or installation of soft shore protection, if feasible
 - Discuss maintenance costs and upkeep associated with hard armor
 - Send information and/or visit new home owners right after purchase and provide them with a “Shore Friendly New Property Owner” manual (similar to Friends of the San Juans) to help guide them on key decisions and provide resources of where they can go for more information

- **Professionals:**
 - Assess true risk to buildings and determine if there is a need for shore protection following consistent and objective methods such as in the *Marine Shoreline Design Guidelines*
 - Understand and discuss maintenance costs and upkeep associated with hard armor
 - Determine feasibility for soft shore protection alternatives where buildings are at risk from coastal erosion and action is needed
 - Assess the condition and effectiveness of existing armor
 - Encourage actions that will leave shore in a natural state, the removal of existing armor and/or installation of soft shore protection, if feasible

- **Permit Office Staff:**
 - Strive to provide a customer friendly approach to people trying to do Shore Friendly actions
 - Provide resources regarding regulatory and permit requirements
 - Provide resources regarding shore protection alternatives and impacts of hard armor
 - Review parcel characteristics and apply regulatory framework
 - Ensure consultation with qualified and acceptable professionals to meet permit requirements

- Encourage actions that will leave shore in a natural state, the removal of existing armor and/or installation of soft shore protection, if feasible
- Deny unnecessary installation of hard armor

- **Contractors:**
 - Understand and abide by permit regulations and requirements
 - Refrain from exaggerating the need for shore protection
 - Understand characteristics of soft shore protection and differences from hard shore protection
 - Encourage actions that will leave shore in a natural state, the removal of existing armor and/or installation of soft shore protection, if feasible

Step 5: The How: Planning your Intervention

A fully developed communications plan is crucial to the success of your social marketing efforts; you need to determine how you will deliver your program’s message to your target audiences.

Beyond the overall Shore Friendly brand, we have developed social marketing tools for local jurisdictions and influencer organizations to include in their Shore Friendly campaign are detailed in this section. As you’re planning your own Shore Friendly campaign, check our campaign toolkit to see the tools we have already created for you to use and then determine any additional items you’ll want to create using Shore Friendly branding or messaging.

Social Marketing Tools:

We have developed a recommended set of social marketing tools and incentives designed to drive shoreline property owners to take Shore Friendly behaviors. The Shore Friendly campaign (explained in greater detail in the Messaging and Creative Concepts starting on [page 28](#) of Task 5: Social Marketing Approach and Campaign Implementation Tools for the Reduction of Puget Sound Shoreline Armor), provides a consistent Puget Sound-wide look and feel for shoreline armor reduction effort and provides a rallying point for localized efforts. Beyond the overall brand, social marketing tools to be included in the campaign are detailed in this section. The chart below maps each tool to its corresponding desired behavior change and barrier.

Desired Behavior	Primary Barriers	Social Marketing Tool
Leave Shore Unarmored	Concern with erosion/storms, waves, or tides might change shoreline	<ul style="list-style-type: none"> • Free Erosion Assessment • Shore Friendly Ambassador • Shore Friendly Certification Program • Shore Friendly Workshops • Shore Friendly New Homeowner Visits/Packets
Remove all or a portion of armor	Concern with erosion	<ul style="list-style-type: none"> • Free Erosion Assessment • Shore Friendly Ambassador • Shore Friendly Certification Program • Shore Friendly Workshops • Shore Friendly New Homeowner Visits/Packets
	Expense of removing armor	<ul style="list-style-type: none"> • Current PBRs (property tax break) • New Shore Friendly Property Tax Incentives • New Shore Friendly Grants • New Shore Friendly Loans • Group Rates for Neighborhoods
	Complicated nature of regulatory and permitting process to remove armor	<ul style="list-style-type: none"> • Streamlined Shore Friendly Permitting • ShoreFriendly.org

		<ul style="list-style-type: none"> • Shore Friendly Ambassador • Shore Friendly Workshops
Change the Social Norm to Favor Natural Shorelines	<p>Habit (belief that armor is a necessary part of living on the shoreline)</p> <p>Peer pressure (see what their neighbors are doing/have done)</p> <p>Don't understand/know about alternatives</p>	<ul style="list-style-type: none"> • Shore Friends • ShoreFriendly.org • Earned Media • Communications Response After Erosion Events • Shore Friendly Demonstration Projects/Tours • Shore Friend Testimonials • Shore Friendly Awards and Recognition

Assistance and Guidance

In order to address audience perception of barriers to our target behaviors, it is crucial to create a convenient means for them to learn more about the current status of their shore, as well as the tools and incentives available to help them maintain or restore their shore.

We believe that these programs should be delivered as a package. No one approach will be effective alone as shoreline property owners represent a range from younger to older persons with varying degrees of comfort with internet and technical information.

In addition, we recommend that you use the Soundwide Parcel Database developed as part of the project to help select behaviors, audiences and specific properties to target.

Ways to deliver assistance and guidance

- **Statewide Website Portal: ShoreFriendly.org**
 In order to provide a consistent, centralized experience for shoreline property owners throughout Puget Sound, your local Shore Friendly effort can develop an online portal on ShoreFriendly.org. Through ShoreFriendly.org, people can select their local jurisdiction to find the tools available to help them take Shore Friendly actions and get resources to learn more about creating or maintaining a Shore Friendly property.

At the core of the website’s functionality is an online screening tool to qualify landowners for a face-to-face experience with their local Shore Friendly campaign (a workshop, site visit, etc.). Because of the complexity of the desired behavior change and the significant barriers to change, the most important step is to get property owners into an education setting where they can learn about their property and shore protection options available to them.

With help from the statewide team, this tool can be customized to qualify local landowners in your target audience based on questions about their property like the setback of structures, bank slope, location, etc.

- **Free Erosion Assessment**

To help people understand how natural processes affect their property, the true erosion risk on their property and to introduce recommended tools for managing the shoreline, the team recommends creating a free program for providing a free professional site visit. Through this program which follows the model developed in the Port Susan Targeted Outreach to Reduce Shore Armor, landowners would be able to schedule a time for an expert to visit their property to assess erosion risk and provide an easy-to-understand erosion assessment for the property in a campaign-branded report. Along with providing an erosion assessment, the reports would point landowners towards Shore Friendly tools for protecting their property and sources for additional help. The coastal professionals who conduct the site visits should have no financial interest and should not directly represent government regulators but are credible third party individuals who can also convey Shore Friendly campaign messaging.

For campaign implementers, it is important to note that focus group participants were supportive of this tool, but concerned that the results of their assessment could influence their insurance rates, or they could be penalized by their local government for unlicensed shore armor. To mitigate this concern, all materials should emphasize that the site visit results will not be provided to regulators and the professionals that conduct the visit do not represent a government agency.

- **Local Shore Friendly Ambassador**

The team recommends that local jurisdictions create a new Shore Friendly Ambassador position to be a resource available for shoreline landowners in their communities. Landowners could contact the ambassador with their questions about shoreline armor, where to get expert advice, permitting and regulatory processes assistance, financial assistance, recommended (if appropriate) professionals/contractors for shoreline projects (see certified contractor program below), and more. Local Shore Friendly Ambassadors could be housed at a central permit assistance/education hub that would serve as a one-stop shop for landowners going through the permitting process to remove armor.

- **Shore Friendly Certification Program**

The Shore Friendly Certification program is a rigorous statewide training and certification program for contractors and professionals that influence and carry out shoreline projects including shore inspections, armor installation, armor repair, armor removal and soft shore protection installation/maintenance. The contents of these trainings could be similar to the training program developed for the Marine Shoreline Design Guidelines, with additional components to be completed for certification. After completing a training program that establishes an understanding of armor alternatives and maintaining healthy unarmored shorelines, the contractors would be added to a list of Certified Contractors available to shoreline property owners. They would then also be permitted to use a Shore Friendly certification mark in their marketing efforts.

The statewide Shore Friendly team can connect you with the materials required to conduct these training programs for professionals in your jurisdiction.

- **Shore Friendly Workshops**

Shore Friendly Workshops are designed to be used by local jurisdictions to educate property owners on how to create a healthy shoreline and address misconceptions about armor and erosion. These workshops also point these audiences to resources to learn more, such as the Shore Friendly Certified Professionals and Contractor list and the Shore Friendly Ambassador. These workshops are intended to build off of existing coastal property management workshops already conducted around Puget Sound and would add components of the social marketing campaign such as unified messaging and recommendations.

- **Streamlined Shore Friendly Permit for Shore Armor Removal/Replacement**

While every armor removal project is different, completing the required permitting process is generally a slow moving, expensive and complicated project that shoreline landowners see as a major barrier. To address these concerns, the team recommends creating a streamlined permitting system for projects that reduce shore armor in your jurisdiction. Tools could include giving armor removal projects priority treatment at permitting offices to ensure quick turnaround and reducing or entirely removing the need for extra studies and permitting fees.

- **Shore Friendly Plants**

Shore Friendly endorses native plants that can help improve and protect unarmored shorelines. As a local implementer, we recommend you work with nurseries to label endorsed native plants. This label would give landowners a shorthand tool for understanding what vegetation will help them protect their shore.

- **Shore Friendly New Homeowner Visits/Packets**

The research conducted through this project indicates key decisions about shore protection are made while purchasing a shoreline property. It also told us that most new purchasers feel that they have no information about what they need to do to responsibly care for and manage their shoreline property. Because of this, there is a key opportunity to educate the new shoreline property owner soon after they purchase their property. To do this we recommend that new property owners receive a mailing and/or visit within one month of buying a shoreline property. The mailing would be a "Shoreline Property Owner's Manual" that includes tips for caring for their shoreline and resources for where to get more information/assistance.

Promotions

Promotions will help to increase overall knowledge of shoreline armoring issues in the Puget Sound and help shift perceptions of shore armor by driving home the social norm that an unarmored shoreline is Shore Friendly. Initial promotions should focus on changing the social norm about armoring until the financial incentives are created to help overcome the cost barrier to armor removal. For consistency with the region-wide Shore Friendly effort, be sure to use Shore Friendly design templates in branding in

the materials you create. Design examples, templates and guidelines can be found in the Task 5E: Shore Friendly Sample Materials.

- **Earned Media**

To help spread the word about the Shore Friendly program and present campaign messages to the public, work with local media to create stories focused on the importance of reducing shoreline armor, highlighting projects of shoreline landowners who have successfully removed armor to create a healthy shoreline, and promoting the Shore Friendly tools available to help landowners. These stories would be the first Shore Friendly campaign touch point for many people and help introduce the concept of armor alternatives.

- **Communications Response Planned to Occur Immediately After Erosion Events**

One of the key instances that influences shore armoring decisions is of an erosion event, either on a landowner's property or in the media. To help landowners make Shore Friendly decisions even when concerned about the safety of their property, we recommend preparing a communications response plan that addresses the concerns that follow an erosion event. This plan would include outreach to media, as well as intensive promotions of Shore Friendly assistance and guidance programs like workshops and erosion score assessments in areas where an erosion event has occurred.

- **Shore Friendly Demonstration Projects/Cruises/Tours**

To familiarize shoreline property owners with soft approaches to shore protection, we recommend creating ways for residents to see what a Shore Friendly project looks like. This could include creating demonstration projects, and sponsoring tours and cruises that would give landowners a chance to visit leading Shore Friendly projects. The projects could include permanent interpretive signs (in parks and public spaces) or be events to private properties. Tours would be guided by Shore Friendly experts that would explain the various natural shore elements being used in the sample projects, explain how they work and highlight how they contribute to a healthy Puget Sound including coastal processes and ecosystem impacts. Participants would also be provided with information on the various incentives for removing armor, maintaining an unarmored shoreline or installing soft protection available through the Shore Friendly campaign. These demonstration projects and tours would build off of those currently being conducted around Puget Sound and would add components of the social marketing campaign such as unified messaging and recommendations.

- **Shore Friendly Awards and Recognition**

To help change the social norm around armoring behaviors, it is important to recognize property owners that practice one of the desired behavior changes. To do this, we recommend that local jurisdictions and organizations running Shore Friendly campaigns design a strategy to provide awards or special recognition to these property owners. This can be done through the development of testimonials mentioned above, but could also include things like a Thank-You letter from a local elected official, an award certificate, an ad placed in a community newspaper etc.

Financial Incentives

One of the top two barriers to armor removal is the cost of removal projects. This financial barrier must be overcome in order for a social marketing effort around armor removal to succeed. Based on an extensive review of the financial incentives currently available to landowners, we believe that there are **not adequate financial incentives in place to overcome the price/cost barrier to armor removal**. We strongly recommend that the state, local jurisdictions and other influencer organizations work together to first create new or enhance existing financial incentives (recommendations below are informed from the research), before a full social marketing campaign around armor removal is launched. While the financial incentive structure is being created, we recommend a focus on preventing new armor from being added (Category 1) and a Soundwide campaign to begin changing the social norm to prefer natural shorelines over armored shorelines, and piloting some of the financial incentives proposed below.

Ways to deliver financial incentives

Currently there are a few tools available to shoreline landowners interested in removing/replacing armor that may be available in your jurisdiction:

- **Current use tax assessment and public benefit rating systems** – Current use tax assessment and Public Benefit Rating System (PBRs) programs incentivize landowners to preserve and steward open space on their property through a property tax reduction. Rather than pay taxes based on the “highest and best use” assessment value, a lower “current use” value is established for the acreage of land qualifying for the program. PBRs programs allow local governments an opportunity to select resources for which to give varying levels of reductions in assessed value depending on the benefit to the public. Nine of the twelve Puget Sound counties have developed independent PBRs programs that define open space resource categories (and criteria) for which a property can qualify for program enrollment. Existing PBRs programs in most counties are administered by the county assessor office, but are sometimes managed jointly with other municipal departments.

These programs currently exist as a viable option for qualified property owners in a county to receive a property tax discount for stewarding or preserving some of their land as open space. However, these PBRs are complex and, as an incentive for shoreline alternatives, are not large enough to overcome the cost barrier to most armor removal projects. In addition, the incentive programs should be altered to be more specific, provide more financial benefit and encourage the desired shoreline behaviors. The Puget Sound Partnership is currently exploring working with local jurisdictions to pilot such improvements.

- **Tax incentive for donation of land or conservation easement** – A tax incentive for a donation of land or conservation easement is available to landowners who are willing and able to make such donations. Land trusts or similar land holding entities and governments can take donations of land or easements that in turn provide a tax deduction for landowners. A well-structured federal tax deduction can make undertaking a protection or restoration project more attractive to a landowner and increase participation in a program. It can be done as an easement with an

ongoing property tax benefit (landowner retains property ownership) or as a donation with a one-time income tax charitable deduction (landowner gives up property ownership). This incentive is probably not viable for most property owners. They work in cases where the property owners have an altruistic desire to protect their land.

New tools the team recommends that the state, local jurisdictions and other influencer organizations consider for reducing price barriers include:

- **Free or discounted permits** – The permit fees for armor removal can be quite high and are seen as a barrier to shoreline property owners. It is recommended that permit fees for armor removal be minimal or free.
- **Shore Friendly Grants** – Create grant programs that individual property owners can apply for Shore Friendly armor removal projects. These could potentially be partially funded by pooled mitigation funds from large shoreline projects (such as port development projects).
- **Shore Friendly Loans** – State, local jurisdictions and other influencer organizations could create a program to provide lower interest long-term (15 to 30 year) loans to property owners to replace bulkheads with soft shore protection. This program could be funded by tax-exempt nonrecourse revenue bonds, revolving loans, or a loan loss reserve program. This is done by the state and local governments issuing bonds that are exempt from federal income tax. This option is described in greater detail on page 122 of the Futurewise February 2014 Draft of the Practical Guide: Incentives to Help Meet Priority Shoreline Restoration and Protection Objectives.
- **Free Technical Assistance** – State, local jurisdictions and other influencer organizations pay professionals that are Shore Friendly certified to do a free or reduced cost coastal site assessment and create plans for armor removal. This takes away the initial price barrier and creates an educational opportunity to inform the property owner about desired Shore Friendly behaviors.
- **Group Rates for Neighborhoods** – Offer financial incentives for neighbors that want to work together to remove armor. These could be special grants or loans, free assistance, or reduced rates on coastal process and design studies performed at a neighborhood scale as well as group rates for construction/installation costs and materials.
- **Shore Friendly Tax Breaks** – Give large, limited-time property tax break to shoreline property owners that remove their armor.

Non-Financial Incentives

Establishing target behaviors as a social norm is the end goal for many social marketing campaigns. Social norming is essentially the process of creating “peer pressure” to change the commonly held perception about an issue. For example, in the 1960s, littering was seen as an acceptable behavior. In the 1970s, this norm was shifted to that society frowned on those that litter. Gaining traction with shoreline property owners will require establishing natural, unarmored shorelines as the norm and creating an attitude of pride around having an unarmored shoreline. These shifts in perception can be created by providing non-financial incentives or points of pride.

Ways to Provide Non-Financial Incentives

- **Shore Friends**

The team recommends establishing a Shore Friends movement that shoreline property owners can join. This would function as recognition program for property owners who choose to maintain their shoreline without armor or to replace with soft armor. The program would be a simple, no-cost way to publically commit to maintaining a Shore Friendly property and celebrate our Sound-wide effort. Shore Friends would not be asked to volunteer or take any actions other than specific actions related to the shoreline protection on their property. If a shoreline property owner does not have existing armor, they would pledge to not install armor in the future or rely on soft shore protection alternatives. If a shoreline owner does have armor, they could apply to join Shore Friends after removing existing armor or replacing armor with a soft shore alternative. Shore Friends would receive a “Shore Friend” yard sign to display on their property, a Shore Friend t-shirt or water bottle, as well as an electronic badge to be displayed on social media. They could optionally be featured on the web page or in other local settings. Shore Friends could also receive benefits such as discounts on Shore Friendly plants or reduced-cost services from businesses participating in the Shore Friendly Certification program.

- **Testimonials**

To help the Shore Friendly movement develop local recognition and consumer trust, the team recommends gathering testimonials from landowners that have been accepted as Shore Friends members. These testimonials could be included throughout campaign materials and would help identify local spokespeople to be featured in earned media efforts. They should include visual before and after pictures of projects and quotes from the property owners.

Social Marketing Tools for Influencer Audiences

Many of the tools above can also be used to reach key influencer audiences for shoreline landowners. While influencer audiences have different areas of expertise, it is important to create a framework in which homeowners receive consistent messages about shoreline armoring from these influencers.

Realtors:

Realtors have great influence over homeowners in one of the most important decision-making points about shoreline armor for landowners: when landowners are in the process of buying or selling their shoreline property. In addition, many realtors like working with shoreline properties since they tend to have higher values. While realtors cannot be expected to become experts on shoreline armor, we recommend conducting Shore Friendly Workshops specifically for realtors. These classes can provide education on the basics of soft shore protection and emphasize how shoreline armor negatively impacts aesthetics and does not increase property value. This approach could use the *With a Water View* workshop series conducted by WSU Cooperative Extensions in Jefferson and Kitsap County with Coastal Geologic Services as a basic starting point. Realtors would also be given information on Shore Friendly resources to provide to their clients. These workshops would build off of existing workshops being offered around Puget Sound and would include unified Shore-Friendly messaging and recommendations. Workshops must be free, offered in slow seasons, and offer Continuing Education Units. Associated professionals such as assessors and appraisers should also be included.

Neighbors:

While we do not have tools designed specifically for reaching neighbors of shoreline landowners, Shore Friendly's tools that influence social norms around shoreline armor can be used to create a network of friends and neighbors of shoreline landowners that are supportive of shore armor alternatives. Shore Friendly's earned media and communications response efforts will create a basic understanding of Shore Friendly messaging in the community. In addition, the Shore Friends program and its yard signs and other public commitments will keep the program top of mind for neighbors. These touch points will help to create a social norm around alternatives to shoreline armor, causing neighbors to see natural shorelines as valuable and encourage shoreline landowners to seek Shore Friendly options.

Outreach Staff:

The single most important tool for social marketing campaigns is face-to-face outreach to the target audience. Research has shown that despite the high per-person cost of one-on-one outreach, it offsets its cost through driving significantly better behavior change results than mass media campaigns.

Because of this, outreach staff are a social marketing tool and influencer audience in one. We recommend establishing a strong base of outreach staff to provide Shore Friendly social marketing approaches. Outreach staff would conduct door-to-door outreach and other direct engagement in high priority areas identified for your Shore Friendly campaign. They would introduce Shore Friendly concepts to landowners and point them to Shore Friendly tools, perhaps even signing landowners up for erosion assessments on the spot.

Professionals:

Professionals with expertise in coastal processes are a crucial influencer audience to leverage for the Shore Friendly campaign. Since these are the experts landowners rely on when making armor decisions, it will be vital to create a local community of professionals that can be relied on to advise landowners to use Shore Friendly alternatives. To help these professionals better understand armor alternatives, we recommend conducting specialized expert-level workshops for professionals. In addition, professionals can seek Shore Friendly Certification (see above) to be listed in Shore Friendly materials as a resource for landowners.

Permit Office Staff:

Permit staff are a crucial gatekeeper for all shoreline projects since they have the final say in determining whether a project goes forward and have a key role in being able to help steer property owners towards shoreline alternatives. Similar to realtors and professionals, we recommend workshops for permit staff that emphasize the environmental and permitting issues around alternative shoreline projects. Permit staff should also be educated on Shore Friendly tools and provided resources and training in ways to encourage landowners seeking permits for shoreline projects to get help through the Shore Friendly campaign.

Contractors:

While ideally landowners will seek advice from professionals with knowledge of coastal processes, there is a wide range of contractors, from landscapers to excavators to homebuilders and bulkhead constructors, which landowners may reach out to for help. Currently, landowners often meet with contractors before they have contact with other influencers such as permitting staff or other professionals. We recommend tailoring workshops to this group as well, with an emphasis on understanding erosion risk, natural options for protecting shorelines, the importance of strictly minimizing site disturbance and maintaining generous setbacks from shorelines for homebuilding projects, and where homeowners should start if they are interested in removing shoreline armor.

In addition to the workshops, contractors can seek Shore Friendly Certification to be listed in Shore Friendly materials as a resource for landowners.

How to use these tools

We recommend relying on a mix of all of these social marketing tools to fully capitalize on each tool's strength and mitigate its weaknesses. Typically, the more narrow the audience of a tool, the greater its ability to create real behavior change. Tools with great reach like advertising or public relations are excellent for creating awareness and shifting opinions, but often have little impact on real behavior. An overview of outreach tool types and advantages/disadvantages to each is below:

One-on-One outreach: This is the most effective form of communication used to create behavioral change. This tactic uses face-to-face interactions and existing personal networks to create and reinforce social norms, e.g., peer pressure. For best results, look for a trusted advocate who can carry your message to an audience in a personable, but influential, manner.

Tools and Incentives: Tools and incentives such as financial assistance are an effective way to overcome target audience barriers. They provide the audiences with a way to defer all or part of the cost of the desired behavior change.

Prompts: A prompt is a visual or auditory aide that reinforces a desired behavioral change. Prompts are generally not used to cause an initial change in behavior, but they are effective in reminding the audience to engage in an action that they are already predisposed to do. Effective prompts are specific and present at the time of behavior. If possible, look for an emotional connection or humor in your prompts.

Public Relations: Public relations tactics add third-party credibility to communicate your message, because it comes from a newspaper, public figure, etc. With public relations, however, you may not be able to control the end message when the media is communicating for you. To be effective in getting media coverage, you must create real news and provide facts and visuals.

Commitments and Pledges: This tactic involves a strong internal pressure to behave consistently—do what you say you will do. Getting written or verbal commitments from your target audience to practice a behavior increases the likelihood that they will follow through. Often, you will want to start with small commitments and build up to more complex ones. This tactic will work best as part of a broader

marketing campaign. This can be as simple as asking a question like, “Would you like to schedule an appointment for an erosion assessment now?”

Events: This tactic allows for direct contact with audiences. Effective events will deliver messages at locations where the target audience already gathers and practices the behavior. Events allow your message to establish a leadership position to the present audience, as well as continue any momentum that your campaign has already generated through other tactics.

Step 6: What’s the Hook: Creating Effective Messaging

A succinct and compelling message strategy is one of the most important things you can do to help ensure the success of your social marketing efforts. We live in a world where the average person is exposed to between 2,000 and 3,000 marketing messages each day. You have about three to five seconds to catch someone’s attention so that they continue reading or viewing to learn more. Effective campaigns use emotion (heartfelt, humor, etc.) to connect with target audiences. Shore Friendly is designed to tap into people’s desire to do the right thing for the environment while assuaging their fears of erosion.

The messaging points for the Shore Friendly campaign in the table below were tested with consumer focus groups and an influencer audience survey. The primary messages in the table as well as the call to action should be present in all Shore Friendly campaign materials, with supporting messages included as necessary based on the focus of your project. Note that the call to action contains a placeholder which should be filled with the primary face-to-face outreach tool being used by your local Shore Friendly campaign. This tool may vary by campaign, but will most likely be a workshop or erosion assessment.

This list may also be expanded on or edited based on the specific services local Shore Friendly campaigns provide or the unique concerns of a locality’s shoreline landowners.

For examples of these messages being used in practice, refer to page 37 through 39 of Task 5A: Social Marketing Approach and Campaign Implementation Tools for the Reduction of Puget Sound Shoreline Armor.

Audience:	Unarmored	Armored
Primary Message	Leaving you shoreline unarmored means you can enjoy the natural beauty of your beach while also protecting the health of Puget Sound.	Removing your shoreline armor can enhance the natural beauty of your property, increase access to your beach and help protect the health of Puget Sound without sacrificing protection from erosion.
Call to Action	Learn how to be Shore Friendly. Sign up for a [primary face-to-face outreach tool] to find out how protect your property and the habitat of Puget Sound.	Learn how to be Shore Friendly. Sign up for a [primary face-to-face outreach tool] to find out how to protect your shoreline while also protecting the habitat of Puget Sound.
Supporting Messages	Installing shoreline armor is expensive, bad for the environment, requires a complicated permitting process and probably isn’t the best way to protect your property.	Shore Friendly is here to make sure that protecting your property and the Puget Sound is easy. We will guide you through the armor removal process – from assessing your erosion risk to streamlining permit applications to getting the work done.
	If your property needs protection from erosion, Shore Friendly can connect you with tax breaks, grants or loans to help you with the cost of installing soft shoreline protection that will protect your property and the	Removing armor doesn’t have to break the bank. Shore Friendly can connect you with tax breaks, grants or loans that will help offset the cost of your project.

	environment.	
	A natural shoreline protects the health of the entire Puget Sound. Unarmored shoreline habitats provide food and refuge for the fish that orca, salmon and seabird populations rely on.	Removing shoreline armor influences the health of the entire Puget Sound. Unarmored shoreline habitats provide food and refuge for the fish that orca, salmon and seabird populations rely on.
	A natural shoreline is beautiful and can add to your property’s appeal and value.	A natural shoreline is beautiful and can add to your property’s appeal and value.
	Installing a bulkhead has a big impact. Along with making it harder to access the beach, bulkheads worsen downdrift erosion, damaging your neighbors’ shoreline and harming habitats far beyond your own property.	A bulkhead has a big impact. Along with making it harder to access the beach, bulkheads worsen downdrift erosion, damaging your neighbors’ shoreline and harming habitats far beyond your own property.
	Living on the shoreline is enhanced when you have easy access to the waterfront. Shore Friendly solutions protect your property from erosion without sacrificing your beach to a bulkhead.	Removing armor can make it easier and safer for your family to get to the waterfront. After all, living on the shoreline is better with easy access to the water!
	In many cases, protecting your property from erosion can be as simple as maintaining native vegetation or reducing surface water runoff.	Shore Friendly soft shore protection looks and feels natural, but is actually carefully designed to protect property from erosion. These methods have been developed and refined by coastal engineers for decades to maximize protection from erosion and minimize environmental impact.
	For shoreline property owners, the decision to protect the Puget Sound starts at home by committing to a Shore Friendly alternative to shoreline armor.	By removing shoreline armor and joining Shore Friendly, you are making a statement to your community that you are committed to a healthy, sustainable Puget Sound.
Shore Friendly Description	Shore Friendly helps shoreline property owners make informed choices about how they manage and protect their shorelines. By being Shore Friendly you can protect the beauty of your shoreline while also protecting the health of Puget Sound.	Shore Friendly helps shoreline property owners make informed choices about how they manage and protect their shorelines. By being Shore Friendly you can protect the beauty of your shoreline while also protecting the health of Puget Sound.

Step 7: Who Else Can Help: Finding Partnership Opportunities

Partnerships can help create demand for your program by providing access to a larger audience, incentives for program participants and added credibility to your cause. The best partners will have a complementary mission or goal, audiences that overlap with your priority audiences, something of value to bring to the table and a need for value that you can offer in return.

Shore Friendly is designed to complement existing programs, not replace or compete with them. Consider opportunities to work with others to offer tools and resources specific to armor, or to help get the word out about Shore Friendly. The only caveat is that Shore Friendly needs to remain specific to armor behaviors and should not be adopted in a way that indicates it covers other shoreline issues.

When considering partnership opportunities:

- Look for partners with a history of collaboration and community involvement.
- Think about who is seen as a credible messenger to your target audience.
- Be sure to consider those in the private, public and nonprofit sectors.
- Identify potential local media partners that could provide added exposure to the program.

Partnership Agreement

A written agreement is an important component of partnership development. This document defines the roles and expectations of each partner. It need not be a formal legal document, but rather a way to bring all parties to agreement about the terms, scope and duration of the partnership. It should outline the following:

- What, specifically, each partner will provide, e.g., “Partner A will draft, design and produce 1,000 brochures to hand out at community events.”
- How roles and approval processes will work, e.g., “Partner A will draft copy for collateral materials, with input and suggestions from Partner B. Final approval and decision-making will rest with A.”
- A timeline for completion of deliverables.

Tips:

- Be sure that the value you will receive from the partnership is worth the time spent coordinating and implementing the partnership.
- When meeting with potential partners, sell the value they will receive.

Step 8: Making It Happen: Implementing Your Plan

Implementation is the final step in making your social marketing program a reality; this is where the magic happens! In this step, you'll put all your previous work to use in deploying your marketing and outreach campaign. Following are some important things to consider:

Staffing

Identify one overall project manager for marketing and outreach activities; this person should have the power to make day-to-day decisions to keep things moving, as well as the ability to call together key decision-makers at major milestones. To support the project manager, appoint one person as the lead on each tactic in the implementation phase and check in regularly on progress.

Work Plan

Your work plan tells you what you're going to do, when you're going to do it and who will be responsible. This document doesn't need to be overly complicated, but it should include a timeline and estimates on staffing needs and resources. Consider including top-line audience, objective and evaluation info in your work plan to ensure that each strategy and tactic is mapping back to these steps.

Budget

Be realistic when developing your budget for the implementation phase. Ensure that the resources are available for each strategy and tactic you employ. Often, it's better to put more resources into a select number of tactics and really do them well than to spread your budget too thin. And remember, if budgets are tight, partners with similar interests may be able to help you combine efforts and maximize your resources.

Tips:

- Implementation takes time and resources; make sure you have adequate budget and staff resources to implement your plans.
- Pay attention to detail; the best idea poorly executed will not help you achieve your goals and objectives. Plan regular meetings and updates for your team to keep implementation moving smoothly.

Step 9: How Will You Know When You Get There: Creating an Evaluation Plan

Creating an evaluation plan lets you track your social marketing program's progress, celebrate successes and make necessary changes along the way. The following steps will guide you through the process of creating an evaluation plan specific to the goals of your local Shore Friendly campaign. It is important to take this step before starting implementation to clearly set expectations for your team and so that you can make adjustments as necessary based on your results. Use this guide, along with the Evaluation Plan Worksheet, to develop your evaluation plan.

Developing a Purpose Statement

Because a purpose statement often shapes what you measure, how you measure and when, it is the first step in developing an evaluation plan. The following are typical potential purposes, addressing why you will be conducting the evaluation and/or how the findings will be used:

- To fulfill a grant requirement
- To determine the most effective intervention tactics
- To prioritize resource allocation for future efforts
- To increase likelihood of securing funding for future similar efforts
- To determine or refine target audiences
- To determine or refine targeted behaviors
- To determine whether this strategy should be used in the future/for a rollout
- To determine outcomes that others can use to set goals for similar projects
- To alert if there is a need for midcourse corrections needed to achieve intended goals
- To determine return on investment (e.g., how much did it cost to change one behavior)
- To determine impact on fish & wildlife or other environmental issues of focus

It is a good idea to choose an overarching/primary purpose and only one or two supporting ones. With too many, you may build in more measurement than is necessary and end up feeling bogged down or overwhelmed by your measurement goals. Others can be adopted in future iterations of your campaign and evaluation.

Defining Potential Metrics

The metrics you track to evaluate your Shore Friendly campaign will likely to fall into one or more of five categories: *inputs*, *outputs*, *outcomes*, *return on investment (ROI)* and *impact*. Measuring ROI and Impact are described later in this document. To start, create a list of the inputs, outputs and outcomes you can measure for your campaign. Tracking these items in a logic model, as shown below, helps to track the flow of your campaign beginning with program inputs (what you put into the campaign), which are the resources used to create outputs (what the target audience gets from the campaign), which then drive outcomes (the response you receive from your target audience).

For Shore Friendly campaigns, we strongly encourage that your focus be on measuring the change in the behavior you are targeting. Measuring inputs and outputs can be useful for describing what the program managers did and for formative learning, but the actual adoption of your targeted behavior (e.g., armor

removal, armor prevented and/or soft shore protection installed) should be your primary evaluation metric. Your campaign is likely to include metrics included in the table below:

Potential Metrics

INPUTS	OUTPUTS	OUTCOMES
<i>What resources will be allocated to the campaign:</i> Dollars Staff Time Volunteer Time Existing Materials	<i>What will resources be spent on:</i> Activities Materials Media Placement Site Visits Other Outreach Research	<i>What target audience responses will be measured:</i> Awareness Understanding Attitudes Intentions Behaviors
Shoreline Armoring Examples:	Shoreline Armoring Examples:	Shoreline Armoring Examples:
Grant funding amount	Site visits	Complete armor removal
Marine Shoreline Design Guides	Workshops	Partial armor removal
New or existing staff FTEs	Focus groups	Installing soft shore protection
Volunteers	Shore Friendly permit process	Shore Friends members
New funding stream	Earned media	Certified professionals
	Communications response	Shore Friendly-trained realtors
	Shore Friendly demonstration projects	Applications for grants or loans
	Testimonials	Calls made to hotline/ambassador
	Outreach materials/staff	Permits for removal filed
	Financial incentives	Attendance at workshops
	Shore Friendly Ambassador	Shore Friendly web site visits
	Tours	Increased beliefs that soft shore protection is effective
	Advertisements	Increased intention to leave shore unarmored
	Signage	
	Free plants	

Measurement Plan

Measurement techniques will vary by metric, organized by the three major categories established earlier: inputs, outputs, and outcomes. It is optimal to build data capture tools into the program before it starts (e.g., having a registration form for workshops that captures information about your audience and their pre-program experiences and attitudes). Whenever you have a “captive” audience member (e.g., at the end of a workshop or site visit), have a plan for obtaining their attitudinal response to your program—satisfaction with learning information presented, intentions to follow up, appeal of offers made, or changes in their attitudes. It is also helpful to ask for unanswered questions of confusing points to improve your program as it rolls out.

Potential Measurement Options

INPUTS	OUTPUTS	OUTCOMES
Source for resources available	Source for how resources are spent	How audience response is measured
Internal records	Internal records	Observation research
Databases	Databases	Pilots
Grants	Data captured by partner organizations	Telephone surveys
Partner records	Media outlets for reach & frequency	Online surveys
	Counts of materials created/distributed	Partner records (e.g., permit offices)
	Counts of calls made by program managers to potential participants	Website metrics/analytics
		Face-to-face interviews
		Focus groups (for attitudes/intent)
		Number of permitted projects
		Registration forms
		Participant surveys

Who will conduct the measurement and when?

Along with identifying what metrics will be measured, it is important to assign clear roles for tracking each metric before starting implementation. This will ensure that you get realistic baseline numbers and can track progress as you go, and that the evaluation plan is not neglected. While your staff may have access to much of the data necessary for tracking your metrics, consider what others can bring to the table as well, including market research contractors, volunteers, or partner organizations.

How much will it cost?

The cost of tracking your metrics will depend greatly on the types of tools required to gather the insight you need. Depending on your objectives, costs could include staff time or time for contractors to develop and implement research tools like survey materials, focus groups or interviews, database planning and development, website interfaces and metrics, as well as the cost of any incentives for participation you provide to respondents.

Calculating Return on Investment

One additional metric to calculate and report on is to determine the cost to changing one behavior, often a component of reporting on Return on Investment (ROI). It is a three-step process:

1. *Money spent*: Determine total costs of the campaign, including value of staff time spent as well as direct expenses with research: development, implementation, and evaluation of the program. In other words, calculate total inputs to the effort.
2. *Behaviors influenced*: Estimate how many people were influenced to adopt Shore Friendly behaviors as a result of the campaign. This should be determined when conducting outcome research.
3. *Cost per behavior influenced*: This is the simplest step, completed by dividing the dollars spent by the numbers of behaviors influenced (Step 1 divided by Step 2).

Intended Impact & Potential Measurement

The ultimate goal of Shore Friendly, beyond reduction of shoreline armor, is to create positive environmental impact for fish and wildlife. If feasible, we recommend developing a plan for measuring this ultimate objective with the understanding that this type of measurement is the most rigorous, costly and often controversial of all measurement types as it needs to control for outside variables that may also have an environmental impact. When developing a plan for measuring environmental impact, consider if and how this measurement will be possible, and when you will undertake this effort.

Appendix A:

Step 1: Setting Goals and Objectives Worksheet

Fill in your draft goals and objectives below. Be sure to revisit them throughout your campaign.

Goal:	
Objective:	
Objective:	
Objective:	
Goal:	
Objective:	
Objective:	
Objective:	
Goal:	
Objective:	
Objective:	
Objective:	

Appendix B:

Step 2: Defining Your Research Needs Worksheet

Fill in the boxes below with your own research needs and ideas.

What information do we need?	What research tools can we use to get it?

Appendix C:

Step 3: Shore Friendly Behavior Changes Worksheet

Review the behaviors below and select those that your campaign will focus on.

Primary behaviors

Behavior	Environmental Impact	Barriers	Opportunity Score* (closer to zero = greater opportunity)
Leave shore unarmored	Very high	Low	0.33
Remove portion of armor	High	Medium	0.77
Replace armor with soft shore protection	Very High	High	0.80
Remove all hard armor	Very High	High	0.80

Supporting behaviors

Behavior	Environmental Impact	Barriers	Opportunity Score* (closer to zero = greater opportunity)
Obtain expert advice	High	Low	0.53
Plant native vegetation	High	Low	0.53
Maintain native vegetation	High	Low	0.63
Address water drainage reaching bluffs	Medium	Low	0.63
Build further from shore than current regs. require	Very High	Medium	0.67

* Opportunity scores can be reviewed in greater detail on page 9 of Task 3: Identifying Behaviors and Mapping Decisions to Reduce Shoreline Armor. The closer a behavior's score is to zero, the greater the amount of resources that should be dedicated to driving that behavior, as they (overall) have the greatest relative potential for environmental impact, homeowner willingness, and the greatest number of property owners that have not completed or are not currently engaged in the behavior as evidenced by either survey responses or parcel status data.

Appendix D:

Step 4: Finding and Segmenting Your Target Audience Worksheet

Use the following worksheets to outline priority audience demographics, characteristics and psychographics. Then use that information to define motivations and barriers for the targeted behavior(s).

Target Audience Profile

Priority Audience	Demographics	Behavioral Characteristics	Psychographics

Motivations and Barriers to Desired Behavior Change

Priority Audience	Desired Behavior Change	Barriers	Motivators

Appendix E:

Step 5: Planning Your Intervention Worksheet

Use the following charts to determine the tools you will use in your Shore Friendly campaign, the specific barriers they will address for your target audience and how the tool will be used.

Assistance and Guidance

Tool	Will you use this tool (Y/N)	Barrier tool will address	How will this tool be used
Campaign Website			
Free Erosion Assessment			
Local Shore Friendly Ambassador			
Shore Friendly Certification Program			
Shore Friendly Workshops			
Streamlined Shore Friendly Permits			
Shore Friendly Plants			
Shore Friendly New Homeowner Visits/Packets			

Promotions

Tool	Will you use this tool (Y/N)	Barrier tool will address	How will this tool be used
Earned Media			
Communications Response Plan			
Shore Friendly Demonstration Projects/ Tours/Cruises			
Shore Friendly Awards and Recognition			

Financial Incentives

Tool	Will you use this tool (Y/N)	Barrier tool will address?	How will this tool be used?
Current use tax assessment and public benefit rating systems			
Tax incentive for donation of land or conservation easement			
Free or Discounted Permits			
Shore Friendly Grants			
Shore Friendly Loans			
Free Technical Assistance			
Group Rates for Neighborhoods			
Shore Friendly Tax Breaks			

Non-Financial Incentives

Tool	Will you use this tool (Y/N)	Barrier tool will address	How will this tool be used
Shore Friends			
Testimonials			

Appendix F:

Step 6: Creating Effective Messaging Worksheet

Complete the form below for each of your target audiences with help from the Shore Friendly messaging we have already developed.

Who is your target audience?	
What behavior do you want your audience to take?	
What is the single most important message for your audience to understand?	
What is the call to action for your audience?	
What are the supporting messages that will help overcome your target audience's barriers?	

Appendix G:

Step 7: Finding Partnership Opportunities Worksheet

Partnership Planning Worksheet

Potential Partner	Complimentary Mission/Goals	Target Audience Overlap?	Value Added from Partner	Value Added for Partner

Appendix H:

Step 7: Sample Partnership Agreement

PARTNERSHIP AGREEMENT

BETWEEN _____ AND _____

Background:

Partnership Agreement Purpose:

The purpose of this agreement is to provide a framework in which _____ and _____ can work together to successfully complete the following:

- _____
- _____
- _____
- _____

Agreement:

In partnership with: _____, _____ will provide:

- _____
- _____
- _____

Approval Processes:

_____ will send any materials with _____'s logo or that will be posted or distributed to _____ for approval. _____ will also send any materials promoting the campaign to _____ for approval, within agreed-upon turnaround times.

Terms of Agreement:

Agreement will be valid from the date of signing below until _____. Amendments to the scope or length of agreement can be arranged in writing between the participating partners at any time.

Agreement:

We, the undersigned, commit our respective organizations to work together on the _____ as outlined in this document.

Date:

Date:

Appendix I:

Step 8: Implementing Your Plan Worksheet

Use the following outline to create a communications plan for your Shore Friendly campaign.

Communication Plan Outline

- I. Goals and Objectives**
- II. Target Audiences**
- III. Desired Behavioral Change**
- IV. Barriers and Motivations**
- V. Message Strategy**
- VI. Partnerships**
- VII. Strategies and Tactics**
- VIII. Timeline and Budget**
- IX. Evaluation Criteria**

Appendix J:

Step 9: Creating an Evaluation Plan Worksheet

Purpose Statement

Program Description

Organization(s) Developing & Implementing Social Marketing Effort

Target Geographic Area

Target Audience/Parcel Type

Targeted Behaviors

Evaluation Plan

Purpose of Evaluation: How Findings Will Be Used

Measurement Plan

What, How, Who, When and How Much

WHAT METRIC	HOW WILL IT BE MEASURED	WHO WILL MEASURE (WHEN)	HOW MUCH THIS WILL COST

Calculating Return on Investment

What metrics and resources spent (inputs) will be used to calculate return on investment?

What behaviors (outcomes) will be used to calculate return on investment?

Intended Impact

What is the intended environmental impact of this effort?

If you intend to measure impact, how will you do this?