



Performance Evaluation Plan

Prepared for: WA Department of Fish and Wildlife and WA State Department of Natural Resources

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Prepared as part of the project: Social Marketing Strategy to Reduce Puget Sound Shoreline Armoring



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 to 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.

The 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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Evaluation Planning Guide

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.

Step 1: 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.

Step 2: 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
What resources will be allocated to the campaign: Dollars Staff Time Volunteer Time Existing Materials	What will resources be spent on: Activities Materials Media Placement Site Visits Other Outreach Research	What target audience responses will be measured: 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	

Step 3: Measurement Plan

How will the metrics be measured?

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 Source for resources available	OUTPUTS Source for how resources are spent	OUTCOMES 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.

Step 4: 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).

Step 5: 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.

Performance Evaluation Plan Worksheet

To Be Completed After Developing Campaign Plan, But Prior to Campaign Implementation

Step 1: 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

Step 3: 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

Step 4: 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?

Step 5: Intended Impact

What is the intended environmental impact of this effort?

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