Stacking the Deck for Highly-Effective Behavioral Policies and Programs:

New Strategies, Tools and Insights for Identifying the Biggest Behavioral Opportunities, Selecting the Most Effective Behavioral Levers, and Scaling up Savings

How can we design behavioral programs and policies in ways that result in broad and measurable savings? That account for the local context, but aren't bogged down in expensive data collection efforts and irrelevant levels of data minutia? That can scale-up participation by engaging groups and social networks, rather than focusing exclusively on reaching individuals and households? That can help us make the best use of our "behavioral toolbox" by identifying the most effective tools for addressing a particular challenge? And that can help us to both evaluate our effectiveness and contribute to the larger body of knowledge that will inform future initiatives?

Stacking the Deck for Highly-Effective Behavioral Programs introduces participants to a set of sophisticated tools, strategies and insights for developing highly effective behavioral programs that identify and target *achievable* behavioral opportunities for reducing energy consumption, enhance program participation, establish behavior change pathways, engage social networks, and scale-up energy savings.

What you will learn:

This workshop draws from industry best practices and a broad range of social science research including sociology, psychology, and behavioral economics (among other related disciplines) to help participants:

- Easily and effectively account for and integrate the characteristics of target communities and successfully identify the most promising and *achievable* behavioral savings opportunities for a particular city, state or region,
- Recognize and match the most appropriate and effective, scientifically-grounded approaches for meeting specific program objectives, scaling up program impacts (and cost effectiveness), and establishing pathways for larger-scale behavioral and cultural transitions,
- Use logic models and experimental designs to:
    - Better understand and communicate a program's underlying causal mechanisms and the relationships between various program elements, and
    - Document and evaluate the effectiveness of program components and outcomes.

Stacking the Deck for Highly Effective Behavioral Programs will focus on three main topic areas:

Identifying Context-Relevant Behavioral Targets. Knowing where to focus program efforts is a key component of program success. Not all behavioral opportunities are created equal and they often vary from one city to the next. Selecting the right target behaviors can determine the likelihood of program success before the program is even launched. The workshop will begin with a discussion of multiple mechanisms for identifying, evaluating and selecting behavioral targets (including the new Municipal Behavior Wedge Estimation Model) and the benefits and disadvantages of each.

Selecting the Most Appropriate and Effective Behavioral Levers. From nudges to norms, people are becoming more familiar with the variety of science-based behavioral levers that are often helpful for developing effective behavioral programs. Nevertheless, most practitioners continue to be unsure about which levers are more likely to be effective under which set of conditions. As such, this portion of the workshop will provide participants with an overview of different behavioral levers and a framework for selecting the most effective approaches based on program objectives and context. We will also discuss strategies for using levers to develop pathways for broader behavioral and cultural transitions as well as the use of multi-level program strategies.

Applying Logic Models and Experimental Designs. Changing individual and organizational behaviors and decisions requires that we think through underlying assumptions about cause and effect, as well as document the manner in which program elements will work together to achieve desired program outcomes. Logic models have gained broad acceptance as an effective approach for documenting program strategies in a way that makes it easy to communicate with funders and others, as well as to assess program synergies and potential program shortcomings. Similarly, experimental designs are receiving increased attention as a means of establishing a rigorous approach for testing and measuring the effectiveness of a program or particular program elements. In this final workshop session, participants will learn more about the key elements in developing effective logic models and how to use them to enhance program outcomes. The session will also provide an overview of different types of experimental and quasi-experimental designs, discussing the value of their use.

How This Workshop Compares to Community-Based Social Marketing

This workshop provides an alternative, albeit complementary approach to Community-based Social Marketing (CBSM) for program and policy personnel who are interested in a more comprehensive and strategic perspective. Some of the core differences are summarized below:

> The traditional CBSM approach provides a specific methodology for assessing behavior-related benefits and barriers and a formula-driven set of tactics (rooted in social psychology) to develop community-level behavior change campaigns. *Stacking the Deck* provides a more comprehensive, strategic, and tailored approach to addressing the human dimensions of energy and climate challenges by:

> 1) Exploring multiple and staged methods of assessing behavioral opportunities,
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> 2) Providing a more comprehensive set of tools and resources from a broader cross-section of social sciences,
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> 3) Introducing an assessment strategy for determining which social science tools are best matched to particular program contexts and challenges,
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> 4) Discussing the value of logic models and developing participants ability to use them, and
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> 5) Exploring the benefits and application of different types of experimental designs to improve program results.

Who should attend?
- Federal, state, and local program and policy administrators;
- Utility professionals;
- Urban sustainability directors;
- Senior Program managers from non-profit and philanthropic organizations;
- Academic researchers; and
- Other professionals who are working to better understand and address the human dimensions of energy and climate change problems and who would like to develop a more strategic, innovative and effective approach.

Whether seasoned or novice, workshop participants will leave with an enhanced repertoire of behavioral strategies and skills for evaluating them.

Date and Time, Registration Fees and Format:
Sunday, December 7th, 2014 -- 12:30 pm to 5:30 pm
Cost: $285 per person (includes snacks throughout the afternoon)
Format: A combination of lecture and discussion.

Facilitator Bios

Dr. Karen Ehrhardt-Martinez, founder and Director of Human Dimensions Research, is internationally recognized for her work on the human dimensions of energy efficiency, conservation, and environmental sustainability. With more than 20 years of experience working as a consultant, program manager and researcher (both quantitative and qualitative), Karen has worked with policymakers, planners, real estate professionals, utilities, and nonprofits to design programs that shift energy use practices, reduce energy consumption and eliminate energy waste in homes and commercial buildings in the U.S. and abroad. In this capacity, Karen has worked collaboratively with the U.S. Green Building Council, the Urban Sustainability Director's Network, the California Institute for Energy and Environment, the International Energy Agency, ACEEE, the SmartGrid Consumer Collaborative and numerous other organizations. Karen is a cofounder of the nationally recognized, Behavior, Energy and Climate Change (BECC) Conference, serving as the 2009 BECC Conference Chair, and has provided expert testimony before the U.S. House Committee on Science and Technology's Subcommittee on Energy and Environment. Karen currently serves as the founder and Director of Human Dimensions Research Associates and is a Senior Research Associate with the Department of Sociology at Colorado State University. Prior to her current position, Karen directed the Climate, Mind, and Behavior Program at the Garrison Institute and established the social and behavioral research program at ACEEE. Karen is a co-author of two chapters in a forthcoming publication on the sociology of climate change (Oxford University Press) and a member of the editorial board for the journal *Energy Efficiency*.

Dr. Kat A. Donnelly, Co-Founder and Chief Executive Officer of Empower Efficiency, LLC, is a nationally recognized behavior change expert. Wearing many hats, Kat oversees business development, strategic planning, and client relations. She specializes in program design and evaluation, qualitative and quantitative customer research, and technology development (i.e., home energy management and data tracking systems). Kat has 25 years of professional experience managing regional projects, mobilizing community support, providing marketing research, as well as wrangling large data sets and teams. She completed two Masters of Science degrees and a PhD from MIT focusing on energy efficiency, clean energy, and behavior change research. Kat simultaneously served as program evaluator for the Connecticut Neighbor to Neighbor Energy Challenge, as well as co-leading the marketing, strategy, and engagement for Duke Energy's Smart Energy Now® commercial behavior program. Kat often advises policymakers and industry leaders on energy-related topics for organizations such as ACEEE, ACI, BECC, DPUC, DOE, IBM, MIT, PG&E, Stanford University, etc.

Linda Dethman, a Managing Director at Research Into Action, has worked over the past 30 years with hundreds of clean energy and water programs, both nationally and internationally. She advises clients on how to improve program performance, engage people, and influence positive behavior changes. Clients routinely call upon her to take on pioneering research and evaluation projects that require experience, multi-disciplinary teams, diverse data sources, intuition, and out-of-the box thinking. Such projects include the research to support introduction of h-axis washers into the United States; development of appliance efficiency labels for the Government of India; and championing research that shows how people make a difference in saving and protecting resources. Linda depends upon her expertise in social science research -- including surveys, interviews, field experiments, and focus groups – to assess existing programs and inspire new ones. Before coming to Research Into Action, Linda managed a group of 50 evaluators, program designers, market researchers, and communicators at Cadmus. She has B.A. in playwriting, and an M.A. and doctoral work in communications research (ABD). She is an award-winning writer and communicator, believes in the power of storytelling, and lives in Portland, Oregon.