

# WCA TIER ASSESSMENT

TIER 1

TIER 2

TIER 3

TIER 4

Program Management								
<b>1. PLANNING</b>		Conduct WCA planning with WCA Contact and Facilities dept		Get sign off from all stakeholders on WCA Plan (including Communications)		Engage Conservation Governance Committee (senior managers of the stakeholders, including HR) in planning		Present to Executive for feedback on WCA Program
<b>2. PARTNERSHIPS</b>		Develop partnerships to deliver program		Engage at least one Executive Champion who is active and visible		Establish program personnel and budget		Incorporate energy conservation goals into 3 department's business plans
<b>3. REPORTING</b>		Report quarterly on campaign results to Green Champions		Report quarterly on estimated energy savings to Green Champions and Executive Champion		Report quarterly on energy savings to Champions and Conservation Governance Committee		Make energy savings publicly available
<b>4. AWARENESS</b>		Demonstrate that 33% of the target audience is aware of the conservation campaigns (aided recall)		Demonstrate that 50% of the target audience is aware of the conservation brand (aided recall)		Demonstrate that 33% of all people at the organization are aware of the conservation brand (aided recall)		Demonstrate that 50% of all people at the organization are aware of the organization's energy conservation achievements (aided recall)
Engagement								
<b>5. TARGET AUDIENCE</b>		Identify and prioritize target audiences and include at least 25% of organization (by energy-use or people) in WCA		Include at least 50% of organization in WCA Plan		Ensure at least 75% of employees and/or sites are included in energy conservation		Ensure everyone and all departments are involved in energy conservation
<b>6. CHAMPIONS</b>		Establish a Green Champions network that meets 4 times per year		Develop formal guidelines for Green Champions		Develop policies to support employee efforts on energy conservation		Include conservation responsibilities in job descriptions in non-energy related positions
<b>7. RECOGNITION</b>		Communicate Green Champions' work and achievements to the organization		Communicate achievements to Green Champions' managers at least twice per year		Establish formal recognition (awards) for employee conservation efforts		Earn external sustainability award for employee engagement initiatives
Strategies								
<b>8. CAMPAIGNS</b>		Develop a calendar of conservation campaigns		Develop campaign toolkits, if applicable, and integrate lessons learned		Translate campaign actions into policies, training and standard operating practices		Develop/test new conservation campaign approaches and opportunities
<b>9. RESULTS</b>		Establish baselines for campaign targets + establish method for determining energy savings		Track campaign results		Demonstrate measurable energy savings from campaigns		Decrease energy use by at least 2% from behaviour changes
<b>10. COMMUNICATIONS</b>		Create campaign communication materials		Establish program branding for conservation		Develop a communications strategy to make everyone aware of WCA results		Publish article on conservation successes in external publication
<b>11. FRESH IDEAS</b>		Attend WCA workshops & connect with sector conservation groups (if applicable)		Solicit employee conservation ideas & best practice ideas		Establish resources to evaluate, prioritize and implement employee and best practice ideas		Present case studies of energy savings from employee engagement efforts to WCA network

JOANNE—FITNESS GURU

wonderfully  
warm  
after  
workout



DANNY—RESIDENT EXPLORER

keeping  
cozy  
in  
layers



LAYER UP AND ENLIST >

# 10. COMMUNICATIONS

## GOAL

Create compelling communications to increase awareness and action for energy conservation.



## 10. COMMUNICATIONS

### Create campaign communications materials

#### WCA REQUIREMENT

1. Create communications materials for target audience for their primary channels of communication (see 1. Planning Resource)
2. Ensure each message has an energy conservation call to action

#### TIPS FOR EFFECTIVE COMMUNICATIONS MATERIALS

- Make it personal - Appeal to your target audience's motivations
- Keep it simple - One action per communication piece
- Prompts (reminders) -- Be specific about the action, place prompts right where the action will take place, make it noticeable (Eg. Turn it Off sticker placed near the switch or equipment to be turned off)
- Ensure communications comply with organizational branding policies
- Refer to the Social Marketing Framework in Appendix 1

#### EXAMPLES

- Ski resort using "Save our snow - close the window" stickers placed near windows appeals to their employees to keep windows closed and to take action to against climate change
- "Take the Stairs" poster is placed near the elevator prompting employees to take the stairs. If the poster is in the stairwell, it is only reaching those who have already made the decision to use the stairs
- "Turn off the light" sticker is placed on the meeting room door so people see it as they are leaving the room

# APPENDIX 1

## POWER SMART SOCIAL MARKETING FRAMEWORK

The following social marketing inspirations were developed from BC Hydro's 20 years of Power Smart experience, findings from social marketing experts, and insights from social change best practices in order to help guide all program and initiative development. These inspirations are meant to be "tools in your toolkit" designed to stimulate ideas and leverage insights that can help catalyze change, rather than a set of rules that must be strictly followed. Nothing here will surprise you!

The ten inspirations are:

### 1. UNDERSTAND PEOPLE NOT CUSTOMERS

- Electricity is a low involvement product; a "customer" view is too narrow and misses their passions, you need to connect to things people care about.
- Businesses are really just a collection of people.
- Meet them where they are: target receptive times in peoples' lives.
- Utilize research findings from sociology and psychology (including brain chemistry): Maslow's Hierarchy of Needs (spontaneity/ creativity, morality, self-esteem/ respect, belonging, security); beware of Cognitive Biases; Decision Making; fear of loss (lost opportunity/social shame).
- Examine non-participants and "Bright Spots" (success stories), for inspiration: observational research uncovers hidden insights when combined with traditional research.

### 2. MAKE AN EMOTIONAL CONNECTION TO GENERATE EXCITEMENT AND AWARENESS

- Use traditional and non-traditional marketing activities including guerrilla marketing and social media.
- Tie to something people care about; consider a shared value and always ask "why will people care?"
- People like fun and games—"Gamification".
- Strive for a simple message.
- Storytelling is critical.
- Leverage the unexpected.
- Excitement and awareness are cyclical and not necessarily a step pattern.
- Concreteness: how do we make our ideas clear and tangible?
- We are more Homer Simpson than Mr. Spock; always play to the emotional and rational side of people.

### 3. DEVELOP PARTNERSHIPS TO IMPROVE AVAILABILITY AND PROMOTION

- Market disrupter vs. game changer: don't alienate existing market channels.
- May take extra effort, but it's worth it.
- It has to be win-win.
- Use convenient and familiar channels.
- Partner with trusted sources.
- External sources can often connect more effectively; but are you willing to relinquish control?
- Build a lasting infrastructure.
- Inspire others to care and deliver your message for you.

### 4. ECONOMICS MAY BE WORKING AGAINST YOU

- Is it a Real or Perceived affordability issue?
- Is there a Split Incentive issue where the investment and benefits flow through different parties?
- Can we change the price signal or change the payback?
- Consider going upstream with your incentive; it can increase the value to the end-user and be easier to manage.
- Change may have a cost to customers beyond the technology or service: shut-down, training, and complaints.
- Think of exclusive offers (i.e. incentives that are "priceless").
- Think of shared value offers.

## 5. REMOVE ACCEPTANCE ISSUES

- Go through the Acceptance Issues (and all other barriers) and identify:
  - Benefits that the person feels they receive from the “old” behaviour (what they will miss);
  - Perceived or real barriers they will feel with the “new” behavior (pain points);
  - Benefits of the new behaviour; this may help create messages that stimulate desire.
- Do we need to absorb or mitigate risk(s) for the customer or partner?
- Be mindful of competitors: direct (sustainability activities) and indirect (competing for mind-space and \$).
- Look in the mirror: how simple is your process? Don’t make programs and initiatives difficult to participate in.

## 6. SET TARGETS, CONSTRUCT A PLAN

- Set inspirational targets as well as short-term achievable targets; large, daunting targets can demotivate.
- Shrink the pain of change and increase positive self-fulfillment with quick-wins.
- Ambiguity is the enemy, script the critical moves to get people started and help them with a plan.
- Simplify choices.
- You can’t change what you can’t measure.

## 7. UTILIZE THE POWER OF NORMS

- People are more likely to take notice or take action if they observe neighbours, colleagues, leaders, or celebrities taking action.
- Norms can stretch across nations or be as specific as for a single neighbourhood or family.
- People are sensitive to the culture/ norm of the community they want to belong to.
- Make people feel like the new activity is the norm.
- Create advocates to sell and co-create: Connectors, Mavens, Sales people (Persuaders). There is continuum to advocacy from Recommenders (positive comments) to Advisors (walk people through the decision process).
- Tap into people as the new media: can be positive or negative (YouTube, Facebook, Twitter, etc.) so make sure you can handle transparency.
- Trust is higher amongst peers.

## 8. GAIN A COMMITMENT

- Use commitments to change behaviour.
- Small actions and commitments can lead to bigger things. You can change how people view themselves through that first action.
- Ask for public commitments.
- Seek out group commitments.

- Get committed people to make the ask for commitments from others.
- Find a way to hold people accountable; peer accountability is strongest.

## 9. PROVIDE FEEDBACK

- Reward progress.
- Recognition is powerful.
- BEWARE of single-action bias: small actions alleviate our guilt and can limit broader change.
- Maintenance, prompts, feedback, triggers, reinforcement—keep top of mind.
- Competition amongst peers is powerful, understanding how you compare to someone else can stimulate interest and motivate action.
- Broadcasting wins to the individual and more broadly to the community will motivate the individual and draw in others.

## 10. ACTION FIRST, HABIT FORMATION, THEN SOCIAL MOVEMENT (IF YOU ARE LUCKY!)

- The first nine inspirations can help to stimulate the first action; then you either repeat the action or relapse. NOTE: people can relapse several times. Stick with it!
- With relapse, remind people how much success they already had—they were almost there.
- Social movements are strengthened if structures are in place, networks are established, and an identity is formed.
- Strive for conversion to a habit or cultural norm. Enabling advocates to communicate on your behalf is more likely to help catalyze that “Swarm” or “Snowball”.

## APPENDIX: ACKNOWLEDGEMENTS

- A.H. Maslow: “A Theory of Human Motivation”
- Chip Heath, Dan Heath: “Made to Stick” and “Switch”
- DDB’s Human Insights
- Evolution of utility Demand Side Management 5 As: Awareness, Availability, Accessibility, Affordability, Acceptance
- Ian Ayres: “Carrots and Sticks”
- Insights and tools from IDEO
- Malcolm Gladwell: “The Tipping Point”
- Marketing Leadership Council: research projects on world-wide best practices in marketing across sectors
- Social marketing experts: Doug Mackenzie-Mohr, Jay Kassier A11-512
- Various social marketing articles and blogs

# APPENDIX 2

## WCA CASE STUDY FRAMEWORK

### GENERAL GUIDELINES

- Focus on the key elements that can be replicated by other groups – the specific behaviours, barriers and motivators that made the campaign successful, ways to measure to change, any lessons learned
- Keep within 2-3 pages
- Use the past tense throughout , even if the program is still running
- Use active voice
- Avoid using any acronyms, and define any at the beginning that you will use throughout
- Provide at least one quote from someone at the organization directly involved in the campaign

### RECOMMENDED FORMAT

#### OVERVIEW

- 1-3 paragraphs outlining the story that could be used as a stand-alone piece.
- Ideally includes a quote.
- Include who the organization is and what they do (if not apparent)

#### CAMPAIGN OBJECTIVE

- 1 sentence on the goal of the campaign
- Include dates the campaign was carried out

#### PARTICIPANTS

- How many buildings/sites and people were involved
- What percentage of the organization does this represent
- Any unique characteristics of this group to note

#### TARGET AUDIENCE(S)

- Specific group being asked to take action
- Barriers identified with this group to taking the desired action
- Motivators for this group

## RESULTS

- 1-2 sentences and charts
- Overall campaign results based on the metric of success, such as percentage of people who are now doing the desired action versus prior to the campaign
- Associated energy savings from the campaign

**IDENTIFY WHO UNDERTOOK THE ACTION:** “The university sent messages to lab instructors” instead of “Messages were sent to lab instructors”

## PROGRAM DESIGN

- 2-3 paragraphs on the campaign design
- Be specific about the behaviour for the target audience
- Communications strategy
- Campaign implementation details
- Follow up

## MEASUREMENT & VERIFICATION

- 1 paragraph on how campaign was measured
- Methodology of determining results
- Any verification of data undertaken
- Assumptions underlying associated energy savings

## KEY ELEMENTS OF SUCCESS

- 1-2 sentences of the critical elements to campaign success
- If this campaign was replicated in another organization what do they need to include in the design or implementation to achieve similar results?

## LESSONS LEARNED

- 1-2 things to consider doing differently if using the campaign
- How these lessons are being integrated into future campaign designs

## QUOTES

- Include a direct quote from someone directly involved in the campaign – someone from the target audience, the head of the department the campaign where the campaign was implemented, someone in the organization who is seeing a direct benefit from the results
- Easiest to draft the quote and get approval/edits from the person quoted
- Include name, position, phone number and email address of the person quoted
- Provide signed consent for BC Hydro to use the quote

## ADDITIONAL INFORMATION

- Provide links to any additional information about the campaign – articles published, website
- Name, contact information and date of the case study author

# APPENDIX 3

## MODEL CONSENT FORM

### PROGRAM NAME: WORKPLACE CONSERVATION AWARENESS PROGRAM

### CONSENT TO COLLECTION, USE AND DISCLOSURE OF PERSONAL INFORMATION

I \_\_\_\_\_,  
(print name)

Consent to the collection, use and disclosure by British Columbia Hydro and Power Authority (“BC Hydro”) of my photograph and/or my personal information, described below, for purposes of publicizing and promoting the Workplace Conservation Awareness Program (“the Initiative”), and my participation in the Initiative, including: advertisements and notices to be published in newspapers, magazines, or other media; newsletters, reports, publications or websites; industry newsletters; and similar publications and media; intended for both internal (BC Hydro) and external (public) audiences, including both inside and outside Canada.

#### FOR THE PURPOSES ABOVE:

1. “my photograph” includes and photograph(s) that I have provided to BC Hydro in connection with my application for and/or participation in the Initiative, and any other photographs or other images of myself (including any likeness or image in still, digital, videotape or other format, and whether I appear alone or together with one or more other persons), that BC Hydro (or others on behalf of BC Hydro) may have taken, made or recorded in connection with my participation in the Initiative; and
2. “my personal information” includes my name and any comments or opinions that I have provided in relation to the Program or other Power Smart programs.

I understand that this information will be used only for the purposes described above, and that any other use will be subject to my further consent.

\_\_\_\_\_  
(signature)

\_\_\_\_\_  
(date)

BC Hydro is collecting this personal information in furtherance of its conservation mandate under the Utilities Commission Act. Any personal information you provide to BC Hydro will be handled in accordance to the (BC) Freedom of Information and Protection of Privacy Act. If you have any questions about how BC Hydro collects, uses or discloses your personal information, you may contact Jennifer Shum, Marketing Product Development Specialist, BC Hydro at **604 623 4414**.