

**RECYCLING PROGRAM  
PROMOTION AND EDUCATION WORKBOOK**

**AUGUST 2007**



Stewardship  
ONTARIO

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# MODULE ONE

## INTRODUCTION

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### 1.1 OVERVIEW

As waste diversion staff, we all know that one of the keys to maximizing participation and capture rates of recyclables is an effective promotion and education (P&E) program. This workbook is designed to help you develop and deliver the best possible P&E program that your time, budget and circumstances allow for.

Now, more than ever, municipalities in Ontario need to increase participation and diversion rates, make the most efficient use of their budgets, and implement best practices. Strong P&E strategies and programs are absolutely key to achieving these goals and improving program effectiveness and efficiency.

Often, municipal recycling promotion and education programs are little more than “random acts of P&E” implemented using a “Ready... Shoot... Aim” strategy.

### 1.2 THE PROBLEM

In all but the largest municipalities, waste diversion staff face many problems in implementing effective P&E programs, including:

- limited staff time to devote to P&E
- little or no formal training in P&E
- limited budgets
- pressures to reduce, rather than increase budgets, as P&E is often seen by councillors as non-essential

As a result, recycling coordinators often find themselves:

- simply updating previous programs
- borrowing ideas that seemed to have worked for others
- implementing programs that appeal to them and their co-workers
- telling people what they know, rather than what they need to hear
- preaching to the converted

What all too often DOES NOT happen is the systematic development, implementation, monitoring, and continuous improvement of an integrated strategy.

### 1.3 THE SOLUTION

A different – strategic – approach to communications is the solution. You need to engage in on-going strategic communication planning. Although it may sound like more work, the results will pay off through more effective and focused messages. Module Two of this workbook will help you develop a basic strategic communication plan, including essential but often neglected steps such as:

- research and assessing the target audience
- pre-testing
- measuring and monitoring

With that plan as a foundation, you can then move on to the specific products (covered in Module Three), comfortable in the knowledge that they are focused on the right messages – those that will truly motivate your residents to make the appropriate behaviour change. It will help you get the biggest bang for your P&E bucks.

However, as mentioned under “The Problem”, municipalities often don’t have the budget to allow them to run anything other than basic information programs. The key is to sell your Council on the notion that a good promotion and education strategy will pay off through more effective messages and motivations, which will lead to increased diversion.

It is also important to note that smaller municipalities have the additional problems of not enough population base to be able to fund some of the largely fixed costs associated with professional focus groups, surveys and strategic planning services. If this is the case for you, don’t despair – get creative. You might have to resort to a less “professional” or “formal” approach, but you can still end up with an effective strategy.

Adopting a strategic planning approach is crucial to almost any P&E task, whether developing an overall multi-year strategy for your entire diversion programs or just figuring out how best to let people know about a change in your program.

## 1.4 BEHAVIOURAL CHANGE VERSUS INFORMATION

Most recycling program educational efforts are focused on providing “how-to” instructions through informational campaigns. However, we are asking people to change their behaviour, and they need to be motivated to make that change, not simply informed of how we want them to change.

Effective strategic planning, therefore, needs to go well beyond simply providing information. It needs to focus on achieving that change. The name give to that behavioural change based approach to promotion and education is called **Community-Based Social Marketing**.

A 2001 study carried out in London, Ontario (The 10% Measurement Study - Informa Market Research) found it was not ignorance that held back non-participants in the recycling program.

MORE ON...

[Selling P&E Budgets to Councils](#)

Appendix A

MORE ON...

[P&E on the Cheap](#)

Appendix B

So you want your residents to recycle? You think giving them a sticker and sending them on their way is going to do the trick? Think again...there's more to it than that.

[www.RE3.org](http://www.RE3.org)

Telephone interviews of 98 non-recyclers in London found that they:

- knew what to recycle and where
- understood the environmental benefits of recycling and how it saves landfill space
- understood that most residents do recycle

When asked why they did not recycle, the majority of residents cited laziness or an uncaring attitude. Only 14% actually admitted they were not recycling because of a lack of knowledge, lack of a Blue Box or because it was too complicated.

So, while information is an important part of the picture, unless other barriers are removed and the right motivation is prompted, your recycling program will never reach its full potential. The key is to adopt a social marketing approach to your strategy and programs. Such an approach:

- looks for the barriers
- uses behaviour-change tools to tackle those barriers
- tests the strategy with a small segment of a community
- evaluates how effective the program is once it was rolled out across a community

## 1.5 WHAT THIS WORKBOOK COVERS

This workbook includes something for all types and sizes of municipalities and programs. It will guide you through developing, implementing, and evaluating your effective P&E program. The best results will be obtained if you work through this workbook from start to finish.

This workbook is designed to help you now and in the future. This workbook and associated resources will be posted and updated on Stewardship Ontario's website. A distilled on-line learning tool version of this workbook is available on Stewardship Ontario's Knowledge Network website:

[www.vubiz.com/stewardship/Welcome.asp](http://www.vubiz.com/stewardship/Welcome.asp)

You may find it useful to quickly go through the on-line tool first, before working in detail through this document. The on-line tool is something you can get through over a lunch hour, and will give you a good feel for what is covered in greater detail in this workbook.

If you are working with this document on-screen, you can click on any of the blue hyperlinks in the "MORE ON: ..." or "CHECK OUT..." boxes and it will take you directly to the appropriate appendix or worksheet. When you get to the end of that appendix or worksheet, you can click on the "back to..." link, and it will take you back to where you were in the main report.

MORE ON...

[Community-Based  
Social Marketing](#)

Appendix C

### **We've Done Our Homework!**

This workbook is based on extensive research conducted by a municipal working group. Research included:

- a survey of Ontario municipal recycling P&E program staff
- a literature review
- six focus group sessions.

You can get the background report from the Stewardship Ontario website, at [http://stewardshipontario.ca/pdf/eefund/reports/68/68\\_phase\\_1\\_and\\_2\\_report.pdf](http://stewardshipontario.ca/pdf/eefund/reports/68/68_phase_1_and_2_report.pdf)

Module Two of this workbook takes you through the nine steps of the **Strategic Communications Planning Process**. It focuses on why you need more than “random acts of promotion and education”, and how to develop an effective and affordable strategic communication plan. It stresses the rationale and methods for incorporating community-based social marketing principles into your plan.

The third module, **The Products**, outlines the key products that might be a part of your plan, with a few simple lessons for each, to help you make the products you select as effective as possible. It is peppered with examples of successful products from the Association of Municipal Recycling Coordinators (AMRC) Promotion & Education Awards. Try to resist the urge to go to this section before working through Module Two: Strategic Communications Planning. That would be reverting to the “Ready...Shoot...Aim” approach so common in waste diversion.

This is followed by Module Four, a short **Summary** which provides a quick wrap up and some thoughts on next steps.

Finally, a series of appendices are included at the end of this report. Rather than clutter up the body of the report with details on topics that only some readers are likely to want or need, we have put these detailed discussions into a series of appendices, and referenced them from appropriate points in the body of the report.

## MODULE TWO

### STRATEGIC COMMUNICATIONS PLANNING PROCESS

---

#### 2.1 WHAT IS STRATEGIC COMMUNICATION PLANNING?

Strategic communications planning is a process for ensuring you are communicating the right messages in the best possible way(s). It makes sure you REALLY:

- know your objectives
- understand your target audience and the behaviours you want to change
- craft your messages
- match your messages to appropriate media
- pre-test your products
- implement, monitor and evaluate.

In an ideal world, you would begin by going through the nine step process outlined in this module, and use it to develop a comprehensive P&E campaign with respect to all aspects of your recycling (and in fact waste management) program. It would identify a whole range of goals and objectives, associated messages, and the best possible media for delivering those messages.

The reality is that your program is probably underway, and you likely don't have the budget for a lengthy "blue sky" planning process. What you really need is a way to identify the most important messages that you need to deliver, and determine the most cost-effective ways to deliver those messages. A strategic planning process does just that.

The key is making sure you don't just dive into creating a message or product. It backs you up a few steps to make sure you create the right message and product (through research and testing) and also gets you to do post-launch monitoring and evaluation, which will help with future P&E activities. Most importantly, it makes sure that your programs actually motivate people to change their behaviour, rather than just inform them of what you want them to do.

The strategic communication planning process can work at many levels, including just helping you to find the best way to get one simple message across. It will also be indispensable when it comes to the annual "selling" your senior staff and Council on the rationale for an appropriate P&E budget.

Remember, strategic planning is key to all decisions, not just P&E programs. It answers 3 important questions:

- Where are you now?
- Where do you want to be?
- How can you best get there?

#### TIP

If you have a community college or university in your area that has a marketing program, approach them for a volunteer or unpaid placement, or a class project that might help you with your strategy.

#### SHOW ME!

See sample strategic plans prepared by Ottawa Valley Waste Recovery Centre and the City of Stratford.

[Appendix D](#)



## 2.2 WHY SHOULD I DO ONE?

A strategic communications plan offers many benefits. It will help you to:

- be proactive rather than reactive to situations
- focus resources on priorities and avoid missed opportunities
- clarify goals and objectives so success can be evaluated
- understand current environment and target audience
- integrate all communications
- ensure everyone is on the same message
- develop better media plans
- effect change

## 2.3 BUDGETING

Good P&E requires time and money, and you will have to deal with your municipality's fiscal and staff realities up front and every step of the way. These budget realities relate both to the strategic planning process and the actual development and production of P&E products.

It is crucial that you revisit your budget periodically in light of what is working, not working, costing more or costing less, and make appropriate revisions, guided by your strategic planning priorities. Do your best to estimate not only hard financial costs for development, production and distribution, but also associated staff resources, as both can be limiting factors. Be prepared to do some "triage" to focus on those projects where your resources will have the most impact.

As important, start focusing on making the strongest possible case for funding for enhanced P&E in next year's budget. Remember, that is not just funding for the products themselves, but also for required strategic planning/updating, as outlined in this module. This is where your research, monitoring and evaluation will really pay off. You need to demonstrate with hard numbers what the impact of P&E activities has been in the past, and will likely be in the future, including all associated benefits such as:

- reduced tipping fees
- potentially reduced garbage collection fees
- WDO funding
- potential to evolve to a more efficient waste management system.

Like any other budget argument before Council, be prepared to do some behind the scenes work to cultivate a political champion to help make your case, presenting the budget as an investment rather than an expenditure. Stress the fact that motivating residents also generates a sense of civic pride, as recycling P&E programs are potentially a very visible demonstration of tax dollars at work doing good.

### An Excerpt from an Expert

Making communication programs work requires planning, but planning need not be a long-term, time-consuming activity. Nor should all the activities be conducted en masse, before any other actions are taken. Planning is easiest and best done bit by bit—related to and just in time for the programmatic tasks it governs. For example, you need certain kinds of information about the intended audiences in order to define them, select them, and set objectives. You need different information to guide message development; gather each type as you need it."

The Pink Book

### FYI

A recent study by KPMG showed that the majority of municipal programs that have achieved a 60% diversion rate budget at least \$1 per household for blue box P&E.

## 2.4 STRATEGIC COMMUNICATIONS PLANNING STEPS

Strategic communication planning takes you through a series of steps, starting with defining goals and ending with evaluation. Of course, in reality, you will have already done work on some of the steps, and you will have to continuously respond to program changes and other variables. The result may be a reality that is less linear than what is outlined below, which is fine. Just make sure you have at least thought through each of the steps, and that you revisit them as circumstances change.

### 2.4.1 STEP ONE: Define Goals and Objectives

The first step in your planning process is to clearly state your goals and objectives. Although often used interchangeably, goals and objectives differ, as outlined below.

**Goals:** A goal is a broad, brief statement that provides focus. It should describe in general terms something to be accomplished and be written with several factors in mind. A goal:

- Covers long time spans relative to objectives
- Can be intangible or tangible
- Should be expressed as a desired outcome or condition to be achieved rather than as an action or process
- Should not predetermine the details of program activities

Goals should be prioritized. You probably only have the resources to handle one or two issues at any one time, so your most important goals should get your attention. Spreading yourself too thin may mean you will not achieve any of your goals.

**Objectives:** An objective should describe something to be accomplished in specific, well-defined, and measurable terms. When setting objectives, think SMART:

**Specific** – be very clear about the what, where, when, and how

**Measurable** – be able to quantify the targets and benefits

**Attainable** – be able to attain the objectives

**Realistic** – be able to obtain the level of change reflected in the objective

**Timely** - state the time period in which they will each be accomplished

#### The Nine Steps

##### Define Goals/Objectives

Conduct Research  
Research Analysis  
Craft Your Message  
Determine Media  
Pre-test  
Implement  
Monitor  
Evaluate

#### Example of a Goal Statement

"Decrease the incidences of contamination in the Blue Box in the downtown collection area."

#### Example of an Objective Statement

"By the end of 2008, there will be a 25% decrease in the rate of Blue Box contamination in the downtown collection area."

Here are some other tips to keep in mind:

- Write your objectives in present tense language with strong verbs such as *plan, conduct, produce*, etc.
- More than one objective may be targeted for a goal.
- An objective is not an activity and not a vision.

Once you have drafted your goal and objective(s), it's time to start creating an action plan. An action plan itemizes work tasks involved in achieving your goal and objective(s). For each work task there is a description, an identification of who is responsible for completing the task, and a target date. Setting the action plan is the core of your overall strategic communications plan. It will help keep you focused, organized and on track. Use the Goal and Objective Setting Worksheet as a basis to get your plan started.

**Note:** Although this workbook presents strategic planning as nine consecutive steps, in practice it is an iterative process. For example, as you do research and pre-testing, you may well discover that your objectives need to be adjusted. Similarly, your action plan will change – tasks may be added or removed. Once you have worked through the first 6 STEPS, you should be able to complete the final action plan.

CHECK OUT  
[Goal and Objective  
Setting Worksheet](#)  
Worksheet 1

### 2.4.2 STEP TWO: Conducting Research

To change behaviour, you need to understand your audience, and that requires research. Too often we develop messages that work for us, but not for the audience.

You NEED to budget for and conduct research to help you:

- identify target audiences
- discover their level of knowledge about and attitude towards your program(s)
- understand the barriers that discourage residents from participating
- determine how residents get (or prefer to get) their messages, what influences their decisions, and the motivators that encourage their action.

Consider both quantitative techniques (that focus on measuring/counting facts) and qualitative techniques (that focus on opinions and attitudes), and be aware of their objective and subjective natures when analyzing the results.

The Nine Steps  
Define Goals/Objectives  
Conduct Research  
Research Analysis  
Craft Your Message  
Determine Media  
Pre-test  
Implement  
Monitor  
Evaluate

The most common research tools are surveys and focus groups, as discussed below. A number of other less formal tools are also profiled.

#### 2.4.2.1 Surveys

Surveys provide you with the numbers regarding what residents do. The vast majority of surveys conducted by polling companies are done over the telephone, using highly-trained staff. This is because what questions you ask, how you phrase the questions, and how you ask and record the answers are all absolutely critical to having meaningful results.

It is important to remember that surveys measure claimed behaviours, not actual behaviour. For this reason, it is good practice not to rely on surveys alone to measure behaviour but to carry out participation monitoring and gather tonnage data.

MORE ON...

[Surveys](#)

Appendix E

#### 2.4.2.2 Focus Groups

Focus groups dig below the numbers and provide insights into why people do what they do. They involve bringing a randomly selected group of people together and taking them in detail through a series of questions and scenarios. They will help you really understand what stops people from doing what you want them to do, and what will prompt them to start doing it. This is normally contracted out to professionals with the required skill set, as selection on participants and managing the sessions are crucial.

There are a couple of recent reports funded through Stewardship Ontario's Effectiveness and Efficiency (E&E) fund that have effectively used focus groups. You may wish to download PDFs of these reports, both to get a sense of how focus groups were used, and to access pertinent P&E findings in the report. For instance, in the first report, key findings included:

- Typically women are most engaged in recycling and overall have a more positive evaluation of their municipal recycling programs, whereas men tend to be more critical. Women are also largely responsible for the coordination of the "in the house" recycling efforts. Based on this finding, the ad campaign surrounding *Blueboxmore* targets primarily women.
- It is crucial to examine the segmentation of recyclers, based on insights from the focus groups and the market measurement study conducted in the GTA ('true believers', 'strivers', 'doubters' and 'dead beats'). Efforts should be focused to move residents from the doubters to the strivers categories.

MORE ON...

[Getting Help](#)

Appendix F

The second report, which was the background research document for this workbook, has many more interesting insights, particularly Section 5, which deals specifically with the Focus Groups results.

MORE ON...

[Focus Groups](#)

Appendix G

The first report can be accessed at:

[http://www.stewardshipontario.ca/pdf/eefund/reports/105/105\\_focus\\_group.pdf](http://www.stewardshipontario.ca/pdf/eefund/reports/105/105_focus_group.pdf)

The second report can be accessed at:

[http://stewardshipontario.ca/pdf/eefund/reports/68/68\\_phase\\_1\\_and\\_2\\_report.pdf](http://stewardshipontario.ca/pdf/eefund/reports/68/68_phase_1_and_2_report.pdf)

### 2.4.2.3 Informal Research

If you don't have the budget to bring in the experts, you can still do informal research that will be useful in developing your message and guiding your program. Here are some ideas:

- Organize meetings as a substitute for focus groups.
- Invite members of the public to attend "planning" meetings. Work to get a cross section of the general public.
- Team up with other organizations to help fill the information gap on your target audience
- Conduct *Intercept Studies* – "man-in-the-street" interviews, where you stop residents in a locale such as a shopping mall, grocery store, or a given neighbourhood and ask a number of survey questions.
- Feedback from forms and from personal contact - Gain valuable insight by asking drop-in traffic and readers how you are doing, and solicit their suggestions and opinions. You can do this through:
  - a form directly on your web site
  - via email
  - through your publications
  - from conversations with visitors to booths at community fairs and other events
- Residents are often more inclined to give you their real feelings in the informal environment of a one-on-one conversation than they might be in a more formal setting.

#### A Excerpt from an Expert

"Recycling coordinators without the budget for polling and focus groups still can find ways to regularly check in with the public. Go to Wal-Mart and keep your ears open and your mouth closed," suggests Bruce Goddard, public affairs director, Alameda County Waste Management Authority (California)."

### 2.4.3 STEP THREE: Research Analysis

The quantitative and qualitative data you collect in STEP TWO is of little use unless you are able to analyse it and form some general conclusions about your target audience to guide your message and program. Your analysis should be able to pinpoint:

- Who your target audiences are
- Knowledge, behaviour and attitudes of the target audiences
- Barriers and motivations to effective behaviour change
- What tactics and messages will address these opportunities and barriers (you may want to refer to Appendix C – Community-Based Social Marketing)

#### The Nine Steps

Define Goals/Objectives  
Conduct Research  
**Research Analysis**  
Craft Your Message  
Determine Media  
Pre-test  
Implement  
Monitor  
Evaluate

Be aware that you may have more than one target audience in your research, and if possible separate out conclusions based on the different audiences. Each one may well require different approaches, different communications and different areas of focus.

For individuals who have adopted a desired behaviour or action, your primary challenge will be to ensure that they maintain that behaviour or action. For those who have not adopted a given behaviour/action, which is typically the more crucial target audience, your analysis should help you focus on barriers and/or relevance for the audience. You need to link the desired behaviour or action to what is important to your audience.

During this assessment stage, you should already be planning what you could do to modify perceptions, eliminate barriers and/or optimize positive influences, while neutralizing or minimizing negative ones.

#### **2.4.4 STEP FOUR: Crafting Your Message**

Developing the right message should flow directly from your goals and objectives and research and analysis. The key is to develop a message statement, and then have the “creative” (the actual words and visuals) follow from that. Note that STEP FOUR: Crafting Your Message and STEP FIVE: Determining Media, should happen concurrently and iteratively. Together, these steps will help you to revise and flesh out your Action Plan, begun back in STEP ONE.

##### *2.4.4.1 Develop Your Message Concept*

Message concepts are verbal descriptions that convey the basic form and appeal of the message including its presentation style, the spokesperson or source, and the slogan or other essential words or symbols. Message concepts are the preliminary ideas which become draft materials that are then tested and refined. The message concept determines what you will say rather than how.

##### *2.4.4.2 Produce Effective Creative*

Now having determined the need for, aim and general concepts of your message, you must develop the wording and graphical/pictorial nature of your message - what the advertising industry calls “the creative”.

Here are some tips from the professionals:

- Tailor the language to the audience—consider reading level, language barriers, concerns about the issue, and understanding of the topic.
- Use words that are straightforward and clear - avoid acronyms and jargon.

#### **The Nine Steps**

Define Goals/Objectives  
Conduct Research  
Research Analysis  
**Craft Your Message**  
Determine Media  
Pre-test  
Implement  
Monitor  
Evaluate

#### **CHECK OUT**

[Developing Message  
Concept Worksheet](#)

Worksheet 2

- Make it easy for the resident to remember what to do, and how and when to do it.
- Copy should be as streamlined as possible. Write your copy, and then edit and cut, then cut it some more, distilling it to its essence.
- Make the message personal. Use the word "you" instead of the third person. Integrate personal or community goals into the delivery of your program and your message.
- Develop a slogan or logo to unify all your materials and reinforce your message.
- Use photos where possible to tell your story as well as words. Many residents prefer photos to cartoons.
- Consider having your message delivered by an individual or organization credible with the audience you are trying to reach.
- Frame your message to indicate what the individual is losing by not acting, rather than what he/she is saving by acting.

#### A Excerpt from an Expert

New Brunswick social marketing guru Doug McKenzie-Mohr tells us all persuasion begins with capturing someone's attention. Without attention, persuasion is impossible. If residents are not motivated to pick up your promotional material, or read the newspaper ad, it doesn't matter what it says. It needs information that is vivid, concrete and personalized. Dr. McKenzie-Mohr suggests using brightly-colored door-hangers rather than flyers or bill inserts. Flyers and bill inserts are frequently ignored. Door hangers that are well designed have a better chance of being noticed.

### 2.4.5 STEP FIVE: Determining Media

Matching your media (e.g. print, radio, television, web, other) to your message (and budget) is an important step in the strategic communications process. You will likely want to use several types of media to improve the chances of your message getting to the target – your residents.

The following are the kinds of things product marketers consider when determining what media to use. It has been modified for the recycling world.

**Who will get the message?** How many residents or households will be exposed to a specific media message during a specific period of time? This is where you can use the information from previous steps, indicating what stations or shows your target audience prefers, what newspapers or magazines they read, and what their literacy/educational levels are.

**How often will it run?** How many times will an audience be exposed to a specific message? Marketers will tell you that repetition helps to sell your message.

#### The Nine Steps

- Define Goals/Objectives
- Conduct Research
- Research Analysis
- Craft Your Message
- Determine Media**
- Pre-test
- Implement
- Monitor
- Evaluate

***Is the message credible and the source reliable?*** Will your target audience believe what they see or hear? Information from non-ads like news stories is more credible than ads. This is why earned media should always be part of your promotion plans. Who delivers the message is also important in establishing credibility.

***Is it cost-effective?*** Do the benefits justify the expense? Television has mass appeal but is expensive, so messages would likely have to be short, and may not be able to be repeated enough to be effective. Print media, being cheaper, allows you to go into more detail or get more repetition.

***Where is the audience?*** Where residents are when they get your message could affect its success. For example if you want them to increase their recycling of boxboard, then hit them in the supermarket where they are thinking about packaging materials. Use posters or displays in or near the store showing various types of acceptable boxboard.

#### **2.4.6 STEP SIX: Pre-testing**

Pre-Testing is how you make sure your carefully crafted messages are likely to work before rolling them out to the full audience. It's a small investment relative to the money being spent on the messages/campaign. Too often, pre-testing is skipped because of lack of funds or time, but the benefits of pre-testing can far outweigh the cost and can end up being a money and time saver.

Pre-testing can help you to:

- determine if your communication materials are on the right track
- find out how your message is likely to be interpreted by your target audience
- determine if the target audience thinks the message relates to them
- test if the audience will follow advice being suggested
- uncover potentially costly mistakes
- identify if some aspect of your material undermines or weakens the message
- avoids the potential for a costly and ineffective message or campaign

The pre-testing phase involves using various methods to test the messages and the media you are using with members of your target audience. As with the Research Step, the most common pre-test tools are surveys and focus groups.

As outlined in STEP EIGHT: Monitoring, it is absolutely critical that you monitor your program to demonstrate and quantify your success (or failure). Pre-launch monitoring is essential if you are to draw any

MORE ON...

[Working with the Media](#)

Appendix H

#### **The Nine Steps**

Define Goals/Objectives  
Conduct Research  
Research Analysis  
Craft Your Message  
Determine Media  
**Pre-test**  
Implement  
Monitor  
Evaluate

MORE ON...

[Pre-Testing](#)

Appendix I



useful conclusions, so give thought to monitoring well in advance of program launch.

### **2.4.7 STEP SEVEN: Implementation**

This is where all the logistical details for your program or campaign launch are finalized. At this point you will have reviewed all of your pre-testing results and made required adjustments. It's time to put everything together into an implementation plan that identifies the steps and associated timings required for each component of your campaign.

There are many things happening when you launch a program or a new program component and in the flurry of activities some details can be overlooked. While you cannot anticipate every eventuality, preparing plans will help to ensure your program launches and runs as smoothly and efficiently as possible.

#### *2.4.7.1 Production and Distribution Plans*

Each component of your strategy will need a production schedule and a distribution plan. Don't forget to consult any partners you may be working with when making final production/distribution decisions.

#### *2.4.7.2 Internal Communications Plan*

It is essential that your internal staff members know about the program and are prepared to answer or direct questions that might arise once the program is launched.

#### *2.4.7.3 Media Relations Plan*

Using the media as a way to reach your target audience can be very effective. This means fully engaging all newspaper, radio and television media in your area. You are likely to get more comprehensive earned coverage from those media from whom you are purchasing services, but all will likely give you at least some coverage and support if you provide them good written, graphic and photographic material.

When developing your media relations plan, consider the following questions:

- What are your objectives for getting media coverage?
- What are the key messages?
- What would you like the media to do? (straight news story, feature article, editorial etc.)
- How will you present information to the media? (through press kits, press releases, letter to the editor, etc.)

#### **The Nine Steps**

Define Goals/Objectives  
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Determine Media  
Pre-test  
**Implement**  
Monitor  
Evaluate

#### CHECK OUT

[Print Production  
Schedule Worksheet](#)

Worksheet 3

#### CHECK OUT

[Video/Audio  
Production Schedule  
Worksheet](#)

Worksheet 4

#### CHECK OUT

[Internal  
Communication  
Checklist](#)

Worksheet 5

- What opportunities do you have planned that might attract media coverage? (special events, special weeks, as a tag on to national or provincial news etc.)
- How often will you work with the media? (include what, who and when)

MORE ON...  
[Working with the Media](#)  
 Appendix H

**2.4.8 STEP EIGHT: Monitoring**

Monitoring is NOT something you just decide to do once the program is launched. You need a monitoring plan as part of your strategy to ensure the appropriate monitoring protocols are in place to consistently record data before, during and after program launch.

Your monitoring plan should be designed to give you information on as many of the following points as possible:

- Is your program being delivered as you planned?
- Are there any problems (with triggers so you can correct any problems in the early stages)?
- What is taking place at the program implementation locations?
- How well are your partners working out?
- How many inquires and other responses you are receiving?
- How much media attention you are receiving?
- How many residents are participating in your program activities?
- Are you on schedule and on budget?

To develop a monitoring strategy you need to decide what information you want to find out and what methods you will use to do it. Respondents to the monitoring plan can include your target audience(s), staff, managers and partners. The key is to gather information from as many different perspectives as possible.

Tracking information is typically collected through the use of forms. These forms can be paper or electronic. The development and use of electronic forms can be very beneficial in promoting easier processing of collected data. The following is a list of data items you may want to track:

- Number and type of contacts received per day/week by telephone, mail, fax, e-mail etc.
- Background information about your contact - help to determine if they are part of your target audience
- Number of items distributed by mail or hand delivery
- Amount of materials ordered or purchased – and inventorying materials to trigger re-ordering on a timely basis
- How those making contact learned about your project
- How much time was spent in responding to each contact

**The Nine Steps**

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**Monitor**  
 Evaluate

**REMEMBER!**

Make sure you have done baseline monitoring PRIOR to your launch, so you have something to compare post-launch monitoring to. It is the only way to truly prove success.

- How many completed feedback/response cards were received
- Tracking of budget expenditures
- Determine the number of news media contacts through press release, interviews, etc. and count newspaper clippings and/or electronic coverage to see how they were used and where the information appeared in the publication
- Number of "hits" or contacts made to your program's Web site
- Material tonnages

One important element of your monitoring program is to determine if your messages are being received the way you intended. Surveys or focus groups of your designated target audiences are both good methods for determining if your message is on target. One or both of these methods can help you to identify:

- If the audience you are reaching matches your intended audience
- If your target audience got the information, and the message was understood
- What reaction your target audience had to your materials
- What your target audience did with the material

"Monitoring and evaluating program performance is something that all local authorities should be doing as a matter of routine. Not only does it enable you to assess whether programs are performing as expected, it also helps diagnose problems, design new approaches and ultimately improve efficiency and effectiveness."

Waste & Resources  
Reduction Action  
Programme (UK)

#### **2.4.9 STEP NINE: Evaluation**

No strategic communications plan is complete without a built-in evaluation component as a way to check accountability and make improvements over time. Promotion and education are not one time activities, so it only makes sense to make sure you learn as much as possible from each new activity or plan, and the only way you can do that is by evaluating. It can also be a very useful tool to justify further or increased promotion and education funding.

The ultimate goal is to determine the effect of your efforts on the target audience and answers the question, "Did our communications/program do what we wanted?"

The word evaluation strikes fear in hearts of many program managers for a host of reasons, as it holds out the possibility of documenting failure. Your time and resources will determine the extent of your evaluation, but some evaluation is always worth the effort.

The benefits of outcome evaluation are:

- Determining whether you achieved your communication/program objectives and to what extent.
- Understanding which strategies worked and which did not
- Allowing for feedback and encouragement to your audience
- Allowing for reporting back to senior management and funders etc.

#### **The Nine Steps**

Define Goals/Objectives  
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Monitor  
**Evaluate**

- Knowing how to improve project activities for effectiveness based on this information
- Justifying budgets and position for increased resources if required
- Assessing the cost-effectiveness of activities
- Increasing or maintaining support for promotion and education
- Contributing to recycling efforts by sharing results with peers

Evaluation really comes down to analyzing your monitoring program results against the goals and objectives you set at the beginning of this strategic planning process. It will help you determine next steps, and ensure that your communications strategy continues to evolve and improve.

## MODULE THREE – THE PRODUCTS

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### 3.1 OVERVIEW

Once you know what are the right products for your particular campaign (you DO have a Strategic Communication Plan, don't you?) you can wade into the details of the specific communication product(s) that will make up your campaign.

This module outlines the most common products used in recycling promotion and education programs, along with tips and examples on how make the end products as strong as possible. The six key media categories that are covered are:

- Print
- Hot-Line
- Web Site
- Radio/Television
- Outreach Presentations
- Other Products and Tools

However, before you wade into the specific products, it is worth reviewing some general tips that apply to almost all the products you might be considering.

### 3.2 GENERAL PRINCIPLES

You are trying to get a message through to someone who may be bombarded with up to 3,000 ads per day from companies with huge promotion budgets, and you need to find a way to get your message to rise to the top and stick in their minds. The following principles may help in this daunting task.

***Humour works, preaching doesn't.*** Humour can help you frame old messages in a new way that will make your message heard, understood, and remembered.

***Incorporate local themes*** Hitting close to home or "personally" helps to get your message noticed.

***Go out on a limb (but not TOO far out)*** As Terry O'Reilly explained in his seminar on Feb 14, 2007 at the AMRC's Spring Workshop, "zig when others zag". Have a unique approach. Consider any proprietary aspect to your recycling program or service which may help to more effectively deliver your message. Also consider breaking the rhythm of the medium (e.g., for radio) to grab residents' attention. But don't go TOO far. Remember the "Stomp On Your PET" campaign? It was effective, but close to crossing over the line of public acceptance.

**Make the listener feel the message.** Make your message meaningful to the resident by engaging them and relating to their wants and needs. Promote the benefits (from the resident's point of view) of the product/service and not just the product/service itself. Diane Black from Praxis Marketing recommends that 80% of the creative should appeal to the emotions that help provide the needed motivation.

**Target women.** Recent research conducted by McConnell Weaver, has shown that recycling promotion should be targeted to women – since the majority of recycling in households is done by women.

**Repeat the Message.** And then repeat it again, using different media. The first time is just planting a seed. It needs multiple repetitions before the message gains credibility. Consider a series of ads that build on each other. Come at the same message from a few different perspectives – different things motivate different people to do any given action. Remember, persuasion takes time.

**Keep It Simple.** Too often, we tell people too much, which just makes them glaze over and ignore it. Single-mindedness is key – one purpose, one message. Consider doing a first draft that includes all of what you THINK you need to say, but then go through each piece of information (with input from others, ideally a focus group) and ask if that REALLY has to be included, or if there is a simpler, more graphic way of saying it.

**Tell Them Only What They NEED To Hear.** This follows from *Keep It Simple*, but bears repeating. What is it that will make them do what you want them to do? They don't need (and likely won't want) to understand all the finer points. You can always refer them to a website or possibly the back side of a print document for those details, if needed.

**Watch Media Boundaries.** Your program boundaries are likely different from your media boundaries, and this can create confusion. Your residents may be getting messages from surrounding programs that differ from yours, and your message may be confusing residents of neighbouring municipalities. Work closely with surrounding municipalities and harmonize programs and messages wherever possible. Where that is not possible, make sure to clearly specify the municipal boundaries to whom your message applies.

**Get Help!** Believe it or not, owning a page layout program does not make you a graphic designer. If you don't have the budget to bring on a graphic design firm in the conventional way, try to find the money to buy a bit of their time on a retainer basis to get occasional input on the areas you are having the most problem with. Look to local retired or community minded experts who may be prepared to donate some time pro-bono or at a discounted rate.

**REMEMBER!**

Singlemindedness is key – one purpose, one message.

MORE ON...

[Getting Help](#)

Appendix F

**Don't Forget the FREE Stuff.** It's all too easy to forget the FREE stuff – all the Public Service Announcements (PSA), press coverage, newsletter inclusions, and more. While these typically cannot on their own generate the behaviour change you are looking for, they are a great way to fulfill the need to repeat and reinforce the message. Don't forget, they are FREE, and in some ways more credible than paid advertising!

MORE ON...  
[P&E on the Cheap](#)  
Appendix B

**Base It On Your Strategic Communications Plan.** If you don't have a communication plan, DO ONE! (see MODULE 2). The product or message you THINK is most needed may in fact not be the most cost-effective allocation of resources. You may be too close to the subject or too used to a certain pattern of communication that may have run its course.

### 3.3 PRINT MEDIA

This is the big one for most municipalities, and the one to focus on first. It is typically one of the most controllable and cost-effective ways to get information across, and it covers a huge gamut of potential products to add to your communications arsenal.

The most common recycling P&E print products are:

- Handouts (including cards, pamphlets and brochures)
- Reminder Cards
- Newspaper Ads
- Calendars
- Newsletters
- Stickers/Posters/Magnets

#### 3.3.1 Handouts

Although much of this workbook focuses on the need to motivate rather than inform, recycling is somewhat complex and municipal-specific activity, and residents will need at least one handout that gives them the information they need to know about HOW to recycle correctly. This is typically done with an information card or brochure that includes information about the what, how and when of recycling. This information piece will be a critical cornerstone to your program, which is then supplemented by various other products that add the WHY to the what, how and when.



For your handout to work, it has to be more than just some text and clip art on a piece of paper. You want people to hang on to it for reference, ideally putting in on their refrigerator or bulletin board.

Here are a few tips to make sure your handout does its job:

- Print it on heavier paper or cardstock (with post-consumer content, of course) so it holds up to repeated handling and doesn't feel like something to pitch in the blue box after a quick glance
- Make it catchy, with some strong, vivid graphics, and at least 2 colours
- Keep it a reasonable size, so people are likely to keep it handy (they may not free up space for an 11 x 17 foldout piece with all they ever wanted to know and more)
- Keep it current by updating it every time you make any change to your program. Experience shows that each time you launch a new P&E piece, you get a boost in your participation and capture rate. If you are not making any changes, it is still worth putting one out every couple of years, even if it just has one or two new messages
- Keep the text to a minimum, at least on the front side. If you list every possible material you recycle on the front, it will have all the appeal of a Bylaw Notice.



Arrange for door-to-door distribution, trying to ensure it doesn't just end up sandwiched in with other junk mail. It is an important piece, so treat it that way. And don't forget to do a decent overrun so you have plenty of extra copies to hand out at your front desk, special events, with replacement or new blue boxes or anywhere else you can think of.

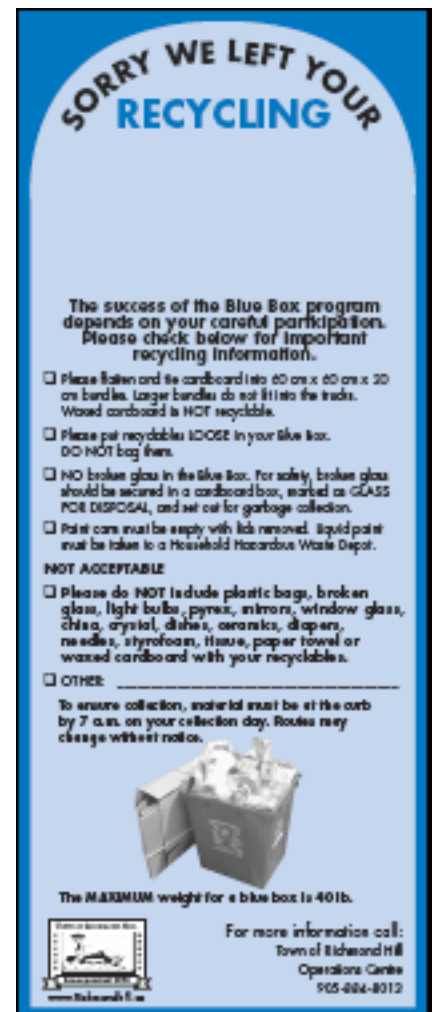
### 3.3.2 Reminder Notices

These are notices that drivers leave behind to let residents know the reason why a setout has not been picked up or why some material is being left behind. If you don't let residents know why a box or material is being left behind, the householder will assume the driver does not care. This may result in that person stopping recycling or even bad-mouthing your program.

DON'T overlook this simple, low-cost communication tool. It's a great opportunity to get residents doing the right thing (which makes your program more effective) and is also one of the chokepoints where it is easy to lose a recycler, and maybe the people they talk to.

Remember these things:

- The use of reminder notices by drivers should be mandated in your collection contract.
- Train your drivers, and update them on a regular basis as to the "do's and don'ts" of collection, as they are your first point of contact with residents
- Require the driver to leave problem boxes or materials behind, even if it may be easier to just accept the material.





- Be prepared for calls resulting from boxes left behind with notices.
- The notice should be upbeat, thanking them for recycling but letting them know very gently what it was the driver could not accept, and why. If it just has a big “X” on it, you are telling them they are wrong, which may turn them off recycling.
- To stop your notice from blowing away, use cardstock or a sticker.
- The notice should have a list of the common mistakes or problems (with solutions). This makes it easy for driver let the resident know what specifically they did wrong.

Reminder notices are fairly simple and low cost. Remember, printing them is not enough – you need to make sure your collection contractor uses them. Test your drivers by having one of your staff set out an unacceptable material.



### 3.3.3 Newspaper Ads

Newspaper ads are another one of those obvious products we think of for program launches, but often then forget about, other than perhaps the occasional reminder ad. While conventional wisdom says you need decent size ads and much repetition to be effective with newspaper ads, get creative with them. If, through studies or talking with your contractor, you’ve noted that you have a particularly low capture rate for a material, or a contamination problem, or any other simple message, a series of newspaper ads (combined with news stories, interviews, displays and other products) can be very effective. The simpler and more graphic the message, the more effective it will be. If you can, leave the dry, serious message behind, and jazz it up with some fun tag line or graphic that will resonate locally.



If you are launching a new program or major program change, consider running a few teaser ads in the weeks in advance of the launch (e.g. Something New To Blue – Coming March 31!) with maybe just a graphic hint of what the change will be). It should be just enough to entice without telling. It’s all just part of making people think the recycling is fun, cool, right.

- Be sure to make use of the free advertising lineage that is provided by the Canadian Newspaper Association and Ontario Community Newspaper Association (CNA/OCNA) as part of their contribution to the Blue Box Program Plan. Information on the program is

available on the WDO website at  
([www.wdo.ca/content/?path=page80+item86507](http://www.wdo.ca/content/?path=page80+item86507))

If you are with a small municipality with limited design skills/budget, don't hesitate to make use of design staff at local newspapers.



### 3.3.4 Calendars

Many municipalities develop a calendar every year that includes information on all the various parts of their waste management programs.

This can be an appealing project to take on because calendars:

- give you space for lots of information
- make sure people know when all special collection days are
- can allow for partnering with other groups to include other environmental messages
- can be done at break-even if you sell ads to sponsors to cover production and distribution costs

However, make sure you have the time, skills and budget to make your calendar effective and appealing so that residents are likely to actually put it up. Residents are often overwhelmed with "free" calendars. Unless the whole package looks reasonably attractive and professional, many people won't choose it as one of the few calendars they actually keep and use.

Your communication strategy should provide direction on whether the effort and expenses of a calendar are warranted for your municipality.



### 3.3.5 Newsletters

Newsletters, if well done and succinct, can also be very cost-effective products. Typically, waste diversion programs create dedicated recycling newsletters, as well as perhaps including a section in a municipal newsletter. Both are great, but don't stop there. Create short, dedicated canned articles to get out in all kinds of local newsletters that groups in your municipality put out to:

- service clubs
- churches
- community/condominium associations
- local environmental NGOs
- cottager associations

Find someone to write an interesting short article on some aspect of waste that relates to that general target audience, and send it out. In most cases, assuming it is well written, the group will gladly pick it up, and then print and distribute it free of charge. This is the sort of quick project that is often easy to entice a volunteer to take on. Just make sure the topic is not overly time sensitive, as it may take a few months before it actually hits the street.

If you decide to do a dedicated recycling (or waste diversion) newsletter, focus on keeping it short, with your efforts going into making it graphically vivid, rather than full of information. Start with a draft with all the things you think you want to say, and then whittle and hack away until you get to the essence. You might well be able to get a volunteer editor to help you in this task – people are typically happier to cut than to write.

Wherever possible, include feedback to residents on how they are doing and what is happening to their recyclables. You might even consider creating a “How Good A Recycler Are You” survey.

### 3.3.6 Sticker/Posters/Magnets

While these can be fun, slick and punchy products, they should be viewed largely as ammunition to back up a primary campaign. They are part of the repetition you need to do to get a message across, and also a key part of establishing the “norms” and “prompts” of Community-Based Social Marketing. The “We Compost Too” sticker that residents put on their blue boxes was a classic great example of this. It very simply and cost-effectively gave residents something that showed their commitment to waste diversion on multiple fronts, and at the same time reinforced the integrated nature of diversion programs (e.g. putting out your blue box will not, in itself, save the planet).



More than anything else, these should be very simple catchy and fun messages, and rely entirely on good creative. People are not going to respond to the messages that might have worked in the early days of recycling (Recycling – Do Your Part, with a clip art of a blue box).

Also, as with any tangible P&E product, think long and hard, and test through focus groups and surveys, before producing and distributing it. The last message you need to give your audience is that you are putting out more things for them to recycle, or in the case of some stickers or magnets, throw out.



### 3.4 HOT-LINES

Although you may not refer to it as a “hot-line”, most programs list one phone number that people should call if they have questions. This may be a municipal number or the number for the contractor who collects your blue box material. Either way, it is a prime point of contact with your target audience, and one therefore worth paying serious attention to.

Here are some simple things you should do on an on-going basis with your hot-line staff (or, working through your contractor, with your contractor's hot-line staff).

- Spot-test staff periodically to determine how friendly they are and how current and accurate the information they provide is
- Continue to keep them current with ALL program developments
- Provide them with stock answers to typical problems/questions, ideally in a quick searchable form/document/database
- Ask them to pass on new questions (even if they were comfortable answering it) so you can create a stock response to add to their list
- Make sure that all people who fill in for the prime hot-line staff are also adequately trained
- If you have key messages that you are trying to get out to your public, let your hot-line staff know what they are, as they may be able to pass on those messages to people that they have helped and appear to be receptive to knowing more about the program
- Have them track the questions that they field, and analyze those tracking forms periodically, as they are a great source of information about what people are not “getting” and therefore what messages you should be targeting.
- Invite hot-line staff to participate directly in any communications strategy development process, as they have real insights you may not have

Remember, your hot-line staff are likely the primary point of contact for both disgruntled residents and residents with questions about your program. These callers need to be handled properly, or you may well lose them as recyclers for good, and have them bad-mouth the program to

their friends. A few poorly handled hot-line calls can do as much damage to your program as a well-designed promotion tool improves your program.

### **3.5 WEB SITES**

Most programs maintain some sort of website related to the recycling program, but often there is substantial room for improvement, even within the often limiting constraints imposed by the corporate nature of municipal sites. As with hot-lines, web sites are a critical point of contact with residents. Users want to access the information they need quickly and easily, and expect a quick response to any emailed question.

Here are some key tips to making your site as effective as possible:

- Start with the layout and logic flow of the site. What are the most common things people are/will use the site for? Let that drive the structure of the site.
- If you can, pull down stats from your web host IT people on which pages are used most, and use them to help guide a structural re-design
- Get some professional help. If you are a small municipality with limited budget, this is something you can often get someone from an environmental committee to donate or do for a nominal honourarium.
- Make it work for dial-up users – don't let it get bogged down with whiz-bang flash features.
- Don't rely on just PDFs of your P&E materials. The web is a different tool with features you should take advantage. Rather than posting a PDF of a heavy information card, it would work better to just have the graphic image of a setout, with links or mouse-overs for each of the materials groups shown on the graphic
- Keep it current with new information, using data on how much has been recycled etc. People will not bookmark a "static" site.
- If you can, incorporate interactive and real-time features as options for interested residents.
- Refer to the website on everything you do (newsletters, articles, ads, radio, etc). Even if it is part of a bigger municipal site, create a catchy name with a URL link to wherever the site actually resides
- Keep it fun – add a cartoon, PDFs from a school poster contest, recycling "did you know..." etc
- Include links to a few of the best, more detailed general recycling or waste diversion sites
- Make sure it is linked to and from other commonly accessed websites in your municipality (that may mean putting in a reciprocal link).

### 3.6 RADIO & TELEVISION

Even smaller municipalities with limited budgets can access radio and television with Public Service Announcements and periodic “creation” of news stories. Don’t overlook these opportunities. However, paid and professionally created radio and television campaigns are likely beyond the budget of all but the large municipalities, as to be effective, you need repetition and impact. The general rule of thumb with radio and television is “go big or go home”. A weak ad that only runs a few times can be worse than nothing.

However, DO work hard to “create” news stories that radio and television might pick up. Let them know when prominent milestones have been reached (tonnes recycled, apartments brought on line, revenue received from materials, etc). Get them stories about a family that only puts out 4 bags a year. Tell them about someone who came up with a creative solution to a recycling problem. If its local, about recycling, and positive, spend a bit of time to package it and get it out to your media outlets – even if they only run 20% of what you give them, it is still a good return on your investment of just a bit of time.

For larger campaigns, you will be working with a creative design contact with far more insights than we can provide here. However, one idea that you may be able to sell to your local radio station is a weekly or even daily “recycling minute” (or partner with an environmental group to create an “enviro-minute”, where some of the spots include recycling messages). You might be able to get co-op students to write and pull off of the web a series of 50 or more short blurbs on different aspects of recycling, including some generic tips, some updates on local activities like HHW days, as well as stories and fun examples of how much is being recycled and what it is being recycled into). Then find a good strong radio voice and offer that package to your local radio station. They may well run with it – they can then “sell” those minutes (e.g. Miniwanka’s Recycling Minute is brought to you by....).

One advantage of radio is that you can create any scenario you want without having to worry about the limitations of visual media. If done well, you can make the listener create images which are likely to have a lasting impact on them.

One last thing – watch your boundaries! Your municipal boundaries are likely different from those of the media outlet, so if you are telling your residents to do something that residents in neighbouring municipalities who are listening/watching that ad are not allowed to do, you need to be very clear about who your message applies to. Likewise, keep in touch with your neighbouring municipalities so they don’t make the same mistake. When you both have the same message, why not share a campaign?

MORE ON...

[Working with the Media](#)

Appendix H

### 3.7 OUTREACH PRESENTATIONS

Messages are best delivered in as close to an intimate, one-on-one manner as possible, with opportunities for discussion. This engages and involves the target audience.

While clearly you cannot reach many people in this manner, it is always worth taking advantage of opportunities to approximate that sort of engaging approach through presentations to community groups. Community outreach gets to people where they are already meeting, rather than holding a meeting on the subject and hoping people come (only to see the same, already committed faces time and again).

This approach can work both for children (through schools and day camps) and adults. Here's what you need to do.

Develop a short (10 to 15 minute) presentation that conveys the key messages of your communication strategy in a fun and lively manner. Try to use a few strong visuals (or, if presenting to school children, games like a recycle relay race). Find someone (maybe you) who is an effective speaker, and train them so they can answer basic questions that might come up. Often you will find good presenters in your community that are willing to do this for free or a nominal honourarium. You might also be able to find good co-op students (check with environmental and drama programs) that are interested in speaking to groups.

Then compile a list of community groups (service clubs, church groups etc) and schools, and contact them to offer them a 20 to 30 minute presentation (including questions and answers). You will likely need to contact groups a few times, and then match their needs with your speaker(s) availability.

This is fairly easy, low cost, and reaches people more or less at random, rather than just hitting the "keeners". Don't worry too much that you are only reaching 20 or so people each time. The fact is, you are REALLY reaching them and shattering their recycling myths. They in turn are likely to pass your messages on to their friends.

### 3.8 OTHER PRODUCTS AND TOOLS

Always be on the lookout for other creative ways to get your message across as effectively as possible. The more tools in your campaign arsenal, the more effectively your message will come across.

**Active (staffed) or static displays** are a tool many municipalities use. These can be used at fairs, community events, or simply set up in high traffic locations near where people are making purchasing decisions (malls, grocery stores). Make the display as eye-catching as possible, and keep messages to a minimum, as you typically only get a few seconds of people's attention. Obviously active displays will be far more effective than static ones, but require the resources (perhaps trained co-op students or community volunteers can help with this), but there is a role for both types of displays. If staffed, consider some sort of contest to draw people in (give away a composter, fleece jacket made from PET bottles, local eco-resort get-away, etc).



**Parades** can be another fun place to get the message across, showing that your program is part of the community, and helping establish recycling as a "norm". They can take a lot of time and expenses, unless you can engage community groups to help you.

**Billboards and bus ads** (inside or outside the bus and/or on bus shelters) are typically only cost-effective for large municipalities, but you may find ways or sponsors to make them happen.

**Email** is becoming a prime means of communicating, so look for ways to get community environmental groups to pass on key messages to their mailing lists. Make sure that it is a strong message related to a particular activity, not just a generic "recycle more" or "do your part". Also ensure the message is as succinct as possible, has a strong subject header, and identifies the municipality (as the email list will likely include people from outside your municipality).



## MODULE FOUR SUMMARY

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By reading through this workbook, rather than just skimming a few interesting sections, you will now have a good understanding of:

- What the key recycling P&E challenges are
- Why you need to motivate, not just inform
- Why you need a strategic communications plan
- How to develop a strategic communications plan
- The range of P&E tools you might use to motivate your target audience, and,
- How to make those tools work

Hopefully, you have also been inspired to check out some of the appendices, worksheets and resources that are referred to in the body of the workbook, and are included in the remainder of this document.

You might also have checked out the short and sweet on-line version of this workbook at Stewardship Ontario's Recyclers' Knowledge Network at [www.stewardshipontario.ca](http://www.stewardshipontario.ca).

Now is the time for action. Before all of this knowledge fades into the recesses of your information-overloaded mind and desk, take the time to jot down key findings as they pertain to your program, and put them on a file on your desktop or elsewhere where you will be prompted to do something with it.

Consider setting aside a lunch hour with a few other key recycling staff to work through the most relevant sections of the document (or the on-line tool) so you can formulate your own action plan, even if it is just an action plan related to securing the budget to carry out a strategic communications plan.

Then hold a second lunch or breakfast meeting to step back and REALLY look at what you have been doing, and what you could do better, based on your learning. Yes, you are swamped and have other fires to fight, but just remember – THE BEST RECYCLING PROGRAM IN THE WORLD WILL NOT WORK UNLESS PEOPLE ARE MOTIVATED TO USE IT! Your P&E programs are absolutely vital, and worth setting time aside for.

## **APPENDIX A**

### **SELLING BUDGETS TO COUNCILS**

Often we know what is needed, and what we have to do. The difficulty is convincing senior staff and council to allocate sufficient budget to accomplish that. Too often, things like promotion and education are considered “soft” items, and therefore expendable when the inevitable final round of budget cuts come in the spring.

The solution? You need to make the strongest possible BUSINESS CASE for your P&E program. Here are some tips on making your case.

- Make sure your presentation is clear and succinct
- State what you intend to accomplish with your P&E program (with specific measurables)
- State what the specific components will be, with a detailed a timeline and budget as you can manage
- Identify the financial implications of achieving your stated goals, including:
  - P&E program costs
  - Associated waste management savings (garbage collection, garbage tipping, revenues, WDO funding, etc)
  - Associated waste management costs (increased recycling collection and processing costs)
- Compare net program costs with and without a P&E program. Factor in possible declines in capture rates to the “without” option.
- Substantiate your assumptions with data from your strategic communication planning research, monitoring and evaluation – you DID do all that, didn't you?
- Include any other indirect benefits (opening door to bi-weekly garbage, user pay, increased employment, greenhouse gas emissions, leadership, meeting WDO best practices, community pride, etc)

You might want to do some “lobbying” with a friendly face on council to make sure they champion your case. Make your case early and often, without becoming a nuisance. And use some of the behavioural change tips in the module to motivate your council to support your program.

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## APPENDIX B

### P&E ON THE CHEAP

It seems that we never even have the P&E budgets that we need, let alone the budgets we would like to have. This is even more the case with small rural municipalities, with smaller populations to spread the fixed costs of P&E strategies and programs over. But don't despair. Below are some tips on how to make the most of your limited P&E budget.

- Tap into community volunteers/groups to help you with your strategy or product development – often a small honourarium can go a long way
- Brainstorm – pull some local ad/media professionals together with any recycling staff (from contractor, depot supervisor etc) for a working lunch and brainstorming session. You would be surprised what you can accomplish
- Take advantage of free and earned media opportunities (press releases with good photo ops, PSA's, human interest stories etc). Remember that media stories carry more credibility than ads ([see Appendix H – Working With Media](#))
- Form partnerships with local media, environmental groups, schools, businesses or anyone else that might be interested in working with you
- Do informal in-house versions of key steps (e.g. focus groups, surveys, monitoring etc.)
- Grab and modify generic graphics from wherever you can, making sure you are entitled to use them. One source is the "Grab and Go" graphics for Rural Recycling Depots on the Knowledge Network

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## APPENDIX C

### A COMMUNITY-BASED SOCIAL MARKETING PRIMER

Community-Based Social Marketing (CBSM) is a communications approach that recognizes that in order to change behaviour, you need to do much more than simply inform your audience. It recognizes that habits are deeply entrenched, and that changing habits is a very complex and challenging task.

In the case of recycling programs, most municipalities already have programs in place, and promotion and education campaigns are therefore focused on:

- Reinforcing messages to improve participation and capture rates
- Dealing with a particular target audience or material that has been underperforming
- Engaging residents in activities related to program changes or enhancements.

A CBSM approach requires a thorough understanding of:

- The stages of behaviour change
- The barriers to change
- Motivating change
- Behaviour change tools
- Maintenance mechanisms

Each are described below.

#### *The Stages of Behaviour Change*

Behaviours do not just “change”. People go through a series of conscious and unconscious steps before they actually adopt the action. These stages are as follows:

| Stage             | Description   | Program Focus   |
|-------------------|---|---|
| Pre-contemplation | residents are unaware of the problem and haven't thought about change               | increase awareness of need for change, personalized information on risks and benefits   |
| Contemplation     | residents are thinking about change, in the near future                             | motivate, encourage to make specific plans  |
| Preparation       | residents are planning to take action, setting gradual goals                        | assist in developing concrete action  |
| Action            | residents are putting in place specific action plans                                | assist with feedback, problem solving, social support, reinforcement                    |
| Maintenance       | residents continue desirable actions, or are repeating periodic recommended step(s) | assist in coping, reminders, finding alternatives, avoiding slips/relapses (as applies) |

## *The Barriers to Change*

Recycling programs typically confront five main barriers. Remember that “perceptual” barriers are “real” to the person confronting them and have to be dealt with as such.

**Inconvenience** – a perception of recycling as inconvenient and/or difficult. Convenience exerts a strong influence on recycling behaviour, which is why curbside programs tend to capture more than depot programs, and why municipalities tend to provide second boxes for free when converting to container/fibre collections. This is most critical with the more challenging target audiences such as multi-family and seasonal residents.

**Lack of Knowledge** – resident’s knowledge of how and/or what to recycle are linked to their level of participation.

**Language** – municipalities with significant populations of people with little or no English must address this issue, either with translation or with highly graphic P&E products

**Resident Turnover** – in areas where people are continuously moving (particularly in apartments), you need mechanisms to ensure that residents get the required P&E products when they move in

**“Why Bother” Factor** - there are still many stories circulating in the media about recyclables going to landfill, programs being too expensive, and other “myths” that people grab onto as their justification for what may in fact be simple laziness.

## *Motivating Change*

Different people are motivated by different considerations. The five most common motivators for recycling behaviours are as follows.

**Concern for the Environment** – the more concerned residents are about the state of the environment, the more likely they are to recycle frequently. The more specific and local the concern (e.g. problems with existing landfill), the more powerful the motivation

**Perceived Effectiveness of Recycling** – the more that residents see recycling as effective, the more likely they are to participate, or to participate more fully. Having a “better” program than other municipalities generates a sense of program and municipal pride

**Benefits of Recycling** – saving landfill, energy reduction, saving natural resources.

**Social Pressure** – residents are motivated to recycle because of direct pressure from friends and family or because their friends and family are recycling.

**Financial Motives** – Although user pay systems for garbage and deposit-return programs provide direct financial motivation, you can also focus on other less direct financial motives associated with program efficiencies or local job creation.

### **A Excerpt from an Expert**

“Knowledge is not a  
motive for behaviour,  
but lack of knowledge  
can be a barrier”

Dr. Wesley Schultz

## *Behaviour Change Tools*

The following techniques should be incorporated into your program.

### **Appealing to Norms**

This is the “get with the program!” message. Residents, by and large, want to be part of the crowd, to do what others are doing. They want to be normal! Focus on establishing the concept that recycling is the norm, particularly with the more challenging target audiences (apartment and seasonal residents, at work etc).

Two types of norms are used:

*Descriptive norms* provide information about what most residents do. A sketch or photograph of a streetscape showing blue boxes in front of each house reinforces that recycling is what you DO – if you DON'T, you are therefore not normal.

*Injunctive norms* provide information about social approval and disapproval – what you should or shouldn't be doing, as opposed to what you *are* doing. Injunctive messages focus on why recycling is a good thing; why residents should be proud of their program, and why throwing out recyclables hurts the environment.

### **Prompts**

Prompting strategies are either written or verbal communications given to an audience to encourage a behaviour or to remind them to do something. Prompts for recycling include stickers and fridge magnets, “instructions” for what kinds of material go into bins, and reminder cards about contaminants. The Blue Box itself is an effective prompt, both in the house and when it is sitting on your neighbour's driveway as a prompt to remind you it's recycling day. Prompts need to be delivered at the right time and place.

### **Commitments**

Residents like to think their actions are consistent with their words. Nobody likes to be called a “hypocrite”. Therefore, when a resident signs a pledge or agrees to take action, s/he is more likely to follow through on the action. And if that commitment is written down and public it has more chance of being sustained.

A good example is when residents are given a “we compost, too” sticker to put on their blue box (or elsewhere) to show commitment by the householder. It is a public statement about what a person intends to do.

It is worth noting that CBSM experience has shown that even small, anonymous pledges can lead to larger subsequent pledges/actions, as residents attempt to be consistent with their previous pledge.

## *Maintaining Behaviour Change*

Residents do not work well in a vacuum. Most of us like to hear we are doing a good job and that what we are doing is contributing to the success of an endeavour. Feedback and follow-up are important methods for reinforcing behaviour change. If your program's participation and/or capture rate is improving, let people know. If it is better than the provincial norm, let them know. Make people aware, on an ongoing basis, that they are making a difference.

For more information on CBSM, go to Doug McKenzie-Mohr's Community Based Social Marketing website:

<http://www.cbsm.com/>

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## **APPENDIX D**

### **SAMPLE COMMUNICATION STRATEGIES**

#### **A - OTTAWA VALLEY WASTE RECOVERY CENTRE**

Ottawa Valley Waste Recovery Centre ([www.ovwrc.com](http://www.ovwrc.com)) provides waste diversion and management services for Town of Petawawa, City of Pembroke, Township of Laurentian Valley, Township of North Algona Wilberforce and the Sebastopol Ward of Bonnechere Valley. The company that accepts OVWRC's steel, notified OVWRC that they would now accept spiral wound containers.

#### ***STEP ONE: Define Goals and Objectives***

**Context:** The company that accepts OVWRC's steel, notified OVWRC that they would now accept spiral wound containers.

**Goal:** Add Spiral Wound Containers to the Container Stream.

**Objective:** Educate OVWRC users in October, 2006 that spiral wound containers are now acceptable in the container recycling stream.

#### ***STEP TWO: Conducting Research***

a) Need to address five audiences:

- Staff – OVWRC sorters, communications staff, phone personnel
- Transfer Station workers
- Haulers/Commercial customers
- Municipal staff
- Residents

b) Asked residents at quarterly liaison meeting, and at six public events (Earth Day festival, environmental fair at school, and presentations to three service groups) about recycling knowledge, participation issues, how they found out about the recycling program, and introduced them to the addition of spiral wound containers.

#### ***STEP THREE: Research Analysis***

**Barriers:** Spiral wound containers are not easily described.

**Motivation:** Residents have four-bag limit every other week for garbage collection and want/need to divert to other streams.

**Tactics:**

- Use photographs – rather than usual line drawings.
- Radio ads would be challenging.
- Use different media for different audiences. Use typical email/channels for internal and municipal staff, and haulers/commercial customers.
- Residents have been trained to learn about changes in the program/municipal events by referring to classified section in local newspapers. The ad template used catches residents' attention.
- Need to develop something different to inform depot users.



Update website, and all relevant publications (e.g., annual collection schedules), as required

#### ***STEP FOUR: Crafting Your Message***

**Message Statement:** Key messaging for residents will promote that spiral wound containers can now be recycled, and will provide direction as to how to identify this type of container in order to maximize diversion from landfill. There are five main internal and external audiences who need to be informed via different channels. All channels will have visual basis.

**Message Concepts:**

1. For staff: email with attached diagram of spiral wound containers
2. For Transfer Station, gatehouse – workers and customers: Posters
3. For Haulers/Commercial customers: Letter that includes picture
4. For Municipal Staff: Letter that includes picture
5. For Residents: Website update; Newspaper ads: article in next Valley Recycler Newsletter; Updates in all 2007 publications (e.g., collection schedules).

**Creative:**

- Photo: Internal staff create photos depicting various sizes of spiral wound containers, containing different foods
- Newspaper ads: A standard template (with header and footer) is used for newspaper ads. Internal staff use photos and develop wording to fill in the ad.

#### ***STEP FIVE: Determining Media***

Multi-media campaign to run primarily in October.

- Ads to run in all local newspapers (some once every two weeks, some monthly).
- Posters: Needed for depot users. Would be based on ad – for consistency.
- Do not use earned media – do not anticipate that media releases would be effective, given the need for residents to see the item to better understand what is now recyclable.

**Budget:** Use “Product Specific Advertising” budget – annual line item to be used to address new issues/program changes.

#### ***STEP SIX: Pre-testing***

- Email liaison group – distribute PDFs of newspaper ad and poster to get feedback
- Ask for feedback at two local home shows.

## STEP SEVEN: Implementation

| Tactic   | Description  | Staff/Resource  | Target Date                          | Cost/Source     |
|--|--|---|--------------------------------------|-----------------|
| E-Mail Notification (Internal staff)   | Send internal e-mail with attached picture of spiral wound containers.   | E. Graham/15 minutes  | October 6                            | None            |
| Posters (Transfer stations, gatehouse)   | Posters will be designed internally, printed in colour and laminated for posting at the transfer stations as well as at the gatehouse. Posters will be sent to NAW, BV, and MadValley for posting. | C. Spadoni/5 Hours-include mailout time.                                      | October 18                           | Minimal         |
| Letter with picture (Municipal Staff, Tomlinson, and Other Commercial Haulers/Customers) | A letter that includes a picture of spiral wound containers will be sent to Municipal Staff, Tomlinson, Other Haulers, and Commercial Customers  | E. Graham-compose letter-30 minutes<br>C. Spadoni-prepare for mailout/3 hours | October 13                           | \$100 (postage) |
| Website Update   | Update website with a spot to include What's New. Add picture of spiral wound containers.  | C. Spadoni/1 hour   | October 11                           | None            |
| Newspaper Advertising (Residents)  | Newspaper Ads in local newspapers:<br>-Leader, Post, Observer, Barry's Bay Use Toby for Observer and Post, Bluebox for Leader and Barry's Bay  | C. Spadoni-draft ad and book in newspapers/8 hours                            | October 13 (have ads booked by then) | \$2000          |
| Valley Recycler Newsletter   | Include a description of spiral wound containers in the next VR  | C-Spadoni-1 hour  | October 20                           | Minimal         |
| Various Publications   | In 2007, when publications are updated (i.e. sorting card, collection schedule, etc.) be sure to include spiral wound containers.  | E.Graham/C. Spadoni   | October 30                           | Minimal         |
| Monitoring - Baseline  | Contact line supervisor to gather baseline visual of current amount of spiral wound containers being received. Get raw data from MRF re: steel tonnage.  | E.Graham  | October 6                            | None            |
| Monitoring - calls   | Ask staff to provide on a weekly basis (every Monday) # of calls received over last week related to spiral wound containers  | E.Graham  | October 6                            | None            |
| Monitoring - tonnage   | Ask MRF supervisor for steel tonnage on  | E.Graham  | Nov 30, Dec 31, Jan                  | None            |

## ***STEP EIGHT: Monitoring***

Key indicators to monitor:

- Steel tonnage from MRF
- Visuals from line controller – are spiral wound containers in correct stream?  
estimated volumes
- Response from residents – number of calls/emails, type of calls/concerns, track  
comments/suggestions

## ***STEP NINE: Evaluation***

- Evaluate the amount of containers coming into the MRF and if in correct stream –  
and overall response from residents to determine if messaging needs changed.
- Conduct informal surveys to determine if residents received messaging – conduct  
surveys at public events during November and December.
- Draft status report – determining if have met goal/objective, to OVWRC board by Jan  
15, 2007.

Review communications plan – noting opportunities for improvement for next material  
launch.

## B – CITY OF STRATFORD

*This Communication Plan draws on the main findings of Effectiveness & Efficiency Fund Project 76 - Optimizing the City of Stratford's Blue Box Program. The project was carried out by the City of Stratford in collaboration with 2cg. The full project report is available on Stewardship Ontario website, at:*

[www.stewardshipontario.ca/eefund/projects/innovative.htm#76](http://www.stewardshipontario.ca/eefund/projects/innovative.htm#76)

### **STEP ONE: Define Goals and Objectives**

**Context:** The City of Stratford's (City) "Pay as You Waste Program" was initiated in 1997 and has contributed to a reduction of the amount of materials going into the waste stream as well as increasing the capture rate of Blue Box recyclables. The City of Stratford diverts approximately 30% more Blue Box material per year than the provincial average, and its capture rate for recyclables is around 70%, compared to a provincial average of 55%.

**Goal:** To revise the City of Stratford's current Communication & Education (C&E) Strategy to acknowledge the City's waste diversion achievements and to build on them to facilitate the capture of additional tonnes of Blue Box recyclables.

Objective:

- To achieve a 60% recovery rate for all materials currently not achieving this rate, with a particular emphasis on those materials below 30% capture rate.

### **STEP TWO: Conducting Research**

The following research was carried out.

**Baseline waste audit:** A waste audit was carried out in September 2005 to obtain baseline waste and recyclables data and to estimate recyclable capture rates. A follow-up waste audit was undertaken in September 2006 to identify changes in capture rates and consider potential impacts of the City's revised Communications and Education materials.

**Review of City's Communication & Education (C&E) materials:** Printed and Web-based materials were examined to assess the following elements: general standards of consistent presentation including colour, fonts, use of graphics and photos, contact information, clearly defined audience, overall impression, key messages and the inclusion of a call to action.

**Resident survey into preferred communications methods:** A short survey was prepared and disseminated to residents to identify current preferred communications methods and possible new communications methods that could be integrated with existing ones. The primary method of survey dissemination was through "at the location" surveying. A representative cross section of locations were selected to disseminate the survey. They are depicted below.

| <b>Group</b>                       | <b>Target population</b>  |
|------------------------------------|---|
| Local Golf and Country Club        | Men and Women, 25-75  |
| Zehr's (grocery store)             | Mothers and children, retired people, shift workers (factory next door) both men and women  |
| Downtown core                      | Business owners and employees in downtown core, people on lunch breaks and factory people, possibly some lower income people  |
| Beer Store                         | Many factory workers, younger people (ages 19-28) and some retired  |
| Men's basketball league            | Men ages 21-45 (teachers, office workers, labourers, factory workers)   |
| Stratford Festival staff           | Employees (ushers, bartenders, office staff) male, female ages 19-70  |
| Hair Salon                         | Women ages 25-55  |
| Environmental Group meeting (CARE) | 2 males, remainder females - Males ages 25-32, females ages 16 - 70. Males, engineer, teacher. Females, student, librarian, Health and Safety coordinator for factory, retail worker, high school librarian |
| Giant Tiger (retail store)         | Young - middle aged mothers with small children (under the ages of 4), grandmothers with children, retired people (ages 55-70). Some factory type or shift workers (male and female ages 26-45).            |
| Dentist                            | Males and females (ages 30-50). Construction type worker, secretary, mother with small child, dentist aged 50-57, hygienist (aged 40-50), teacher (29)  |

A display was also set up at City Hall for residents to fill out the survey.

A total of 219 surveys were completed. A copy of the survey is available in Appendix A.

## **STEP THREE: Research Analysis**

**Baseline waste audit:** The waste audit results revealed that the following Blue Box materials were not being captured at an average recovery rate of 60%.

- Mixed fine paper
- Books
- Other paper
- Kraft paper
- Molded pulp
- PET other packaging
- HDPE Other Bottles & Jugs
- Other Bottles, Jugs and Jars (plastic)
- Wide Mouth Tubs and Lids (plastic)
- Other Rigid Plastic Packaging
- Aluminum Foil and Trays

Particularly low (i.e. less than 30%) recovery rates were noted for Other paper, Kraft paper, Laminated/Other plastic packaging and Aluminum Foil and Foil trays.

**Review of City's communication & education (C&E) program:** An external review of C&E materials was conducted by the project consultant. The assessment of the printed materials ranged from Poor to Good. In general, the materials were copy heavy and did not reflect a consistent or recognizable style. Identification markings such as the community logo or crest or a waste/recycling symbol were used sporadically and appeared interchangeable but with no identifiable pattern.

The ratings for the web-based C&E materials were higher than for the printed materials. The material was nonetheless copy heavy and seldom used bulleting or short statements to convey key messages. The material seemed to be produced with the mind set that each document/page will be read in its entirety, which is rarely the case.

**Resident survey into preferred communications methods:** The survey result indicated that nearly 60% of respondents identified the Waste Reduction Program Calendar (Calendar) as a primary source for recycling information, reinforcing this high level of public awareness and profile attached to this communications tactic. *Decision: Maintain an annual calendar as a key element of the C&E strategy.*

Over 80% of respondents have access to the internet and e-mail although only 20% of respondents indicated they would like to receive information about the City's Blue Box recycling program by e-mail. Part of the investigation identified barriers to expanding the use of electronic messaging and the suitability of creating a marketing plan with a more distinct focus on web-based tactics. *Decision: develop options for those residents who are now ready to accept city information electronically, and foster this behaviour amongst those that were not already doing so.*

Close to 50% of respondents indicated that they read the weekly community newspaper. *Decision: privilege weekly publications over daily newspapers.*

Just fewer than 80% of survey respondents reported they use a personal vehicle as their primary method of transportation to work. *Decision: investigate the use of communications methods including signage (e.g. billboards, in-transit advertisements) and radio.*

## **STEP FOUR: Crafting Your Message**

**Development of general C&E message:** The development of a priority message was based on the review of the current C&E materials, the survey results, and municipal waste management goals. A new theme – one that was judged to be congratulatory, positive and acknowledged room to achieve even greater success – was developed to help re-brand the City's waste diversion programs. The theme "*Blue Today for a Green Tomorrow*" was selected and a simple logo was designed around this theme.

**Development of specific C&E messages:** Specific messages were developed on the basis of the September 2005 waste audit analysis. These encouraged residents to recycle those materials that presented capture rates lower than 60%.

**Development of new C&E pieces:** New and revised C&E materials were developed that included general and specific C&E messages. The following five core pieces form the base for all recycling program information delivery, and will be subject to a yearly review for information updating. The review will also serve to determine whether the materials are still considered valuable, year over year.

- Detailed Recycling Instructions
- The Recycling Calendar
- Recycling Newsletter
- The Recycling Poster
- Frequently Asked Questions

## **STEP FIVE: Determining Media**

C&E dissemination methods were selected on the basis of the results of the resident survey into preferred communications methods. Research was undertaken to identify additional dissemination methods that could be used such as community resources. The following headings outline the preferred methods of information distribution for the City of Stratford waste management C&E pieces:

### **Information published in the local telephone directory**

The City of Stratford's Waste Reduction Program Calendar is traditionally published in the local telephone book. The survey into preferred methods of communications indicated residents are well aware of the publication and where to find it.

### **Web site**

The numbers of residents with access to the internet and/or email accounts is substantial and these numbers will continue to increase. Delivering the message via the internet is a fast and cost effective means of information dissemination.

### **City Message Boards in Public Areas**

The City of Stratford has access to display areas in community facilities. Research indicated these locations represented an opportunity as they were not being used on a regular basis as message centres for the Waste Management Program.

### **Community Weekly Print Publications**

In many cases small and medium sized urban centres have the benefit of a weekly print publication that is distributed across the community. The City of Stratford uses the "Town Crier" section of the local papers to place information on recycling, waste collection, hazardous waste days, ect. The shelf life of the publication is attractive as it serves as reference material and removal from the home is often on a weekly basis. Moreover, the broad based community weekly offers a solid repetitive audience.

### **Direct Mail**

Survey results indicated a majority of respondents preferred not to receive direct mail messaging and a review of the City's standard delivery methods revealed that Stratford does not generally rely on this delivery mechanism for any of its messaging. However, on occasion it may be necessary to ensure a message is sent to every resident or address and to document its delivery. In these cases, the city will consider mechanisms to ensure the cost-effectiveness of direct mail distribution, by sharing messaging and postage costs with other related municipal departments (e.g. by sending a water bill with a special reminder for recycling services or notice).

## ***STEP SIX: Pre-testing***

Pre-testing was carried out internally with the project team. Staff indicated that in hindsight, it would have been beneficial to carry out external pre-testing of the calendar through either expert reviewers or intercept interviews – or any other of the methods described in Step 6 of the P&E module on the Knowledge Network – as some residents found it difficult to interpret the leaf and yard waste collection weeks.

## ***STEP SEVEN: Implementation***

The implementation timetable below was developed to help the City continue the refinement of revised C&E pieces, selecting the message dissemination venues, creating communication and education materials and determining a dissemination schedule.



|   | <b>Detailed Recycling Instructions (residential)</b>                  | <b>Release Date</b>                            | <b>Review Date</b>   | <b>Action Item/ Co-ordinator</b>   | <b>Costs</b>   |
|---|---|--|----------------------|--|--|
| Local Telephone Directory (calendar distribution) | Annual calendar distribution  | Month 1  | Month 10             | Copy review, update & production   | \$2444.06  |
| Web Site  | Maintain calendar and recycling instructions                          | Month 1  | Month 12             | Copy review and update   | Internal costs   |
| Direct Mail                                       | Disseminate messages as required                                      | As required                                    | As required          | Develop Copy and Distribute  | N/A  |
| City Message Boards                               | Support Poster Message  | Month 3 and 9                                  | Month 10             | Copy review, update & production   | Ads were conceived so as to be easily printable from an office colour printer as needed. |
| Community Weekly Publications                     | 1. Reminder placement in City Notices<br>2. Printed Copy for Tear Out | 1. Month 1-12<br>Bi-monthly<br>2. Months 3 & 9 | Month 12<br>Month 10 | Copy review, update & production   | OCNA space was utilized  |
| Additional Methods                                | Have recycling instructions at places frequented by public            | Month 1  | Month 10             | Copy review, update & production<br><br>Review and update site locations |  |

A Media Release was produced for local distribution to all media and community outlets to launch the revised C&E pieces. This media release coincided with the release of a revised recycling calendar. The calendar was distributed to all households. There was minimal media interest in the revised C&E program, although the calendar was well received by the public. In hindsight, more frequent calls could have been placed and possibly from a higher level of management.

There were some further refinements made to the C&E program over the summer of 2006. It was decided to re-launch the revised C&E program, a second time, in conjunction with Waste Reduction week. There was modest media interest. In hindsight, more frequent calls could have been placed and possibly from a higher level of management.

## ***STEPS EIGHT AND NINE: Monitoring and Evaluation***

A second waste audit was undertaken in mid-September 2006. The same methodology was employed as was for the waste audits conducted in September 2005.

There was not much change from 2005 to 2006 although 2 plastic categories that had a capture rate of less than 60% exceeded this rate in 2006. Particularly low (i.e. less than 30%) recovery rates were noted for Other paper, Kraft paper, aseptic packaging, and other bottles, jars and jugs and Aluminum Foil and Foil trays. Improvement was noted for some of these items.

Overall the 2006 results were quite similar to 2005 results. There appeared to be some modest improvements in the capture of some materials. Overall waste generation increased and recycling rate decreased marginally although this is likely due to natural variability.

Although the revised C&E pieces did not appear to have an immediate measurable impact on capture rates in the Blue Box, it should be noted that some changes may take place over a longer time frame.

As additional follow up, the City of Stratford will be utilizing the OCNA space to promote its tetra pack and foil ads, due to the feedback received from residents regarding these two materials.

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## APPENDIX E

### SURVEYS

If you don't have the budget to contract out a survey to a professional survey company, consider doing it yourself (internally). Here are some tips for drafting and conducting an effective survey:

- Make sure your interviewers are well-trained in survey delivery so as not to bias the responses.
- State the objective of the survey.
- Determine the key issue(s)/topic(s).
- Use primarily closed-ended questions (e.g. ask them yes/no, true/false, or a multiple choice question with a blank option for "other")
- Alternatively, survey respondents may be offered a ranking scale response.
- Limit your survey length to no more than 20-25 questions or 15 to 20 minutes in length.
- If possible, pre-test the draft survey with about 10 to 15 randomly selected residents to identify any problems with its design.

#### *For Web-Based Surveys*

- Do not have more than 10 questions and use check boxes
- Add a "tell us more" section at the end of the survey to capture ideas, impressions and opinions
- Work with an IT or web specialist to make sure that responses are automatically processed into a data base
- Note: since residents have to be directed to find the relevant web pages, these surveys cannot be considered random or representative of the general public
- Promote the survey aggressively, and if possible provide an incentive to respondents

#### *For Mail-In Surveys*

- Provide an incentive for filling out the survey (e.g. a draw for a composter)
- Consider pre-paid postage to improve return rates

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## **APPENDIX F**

### **GETTING HELP – WHEN AND HOW TO HIRE A CONSULTANT**

While you are an expert in the recycling field, you may not be as experienced in all aspects of creating a strategic communications plan. If you have the budget, consider hiring a strategic communications planner, or at least an expert to help you with specific components of your plan, such as a survey or a focus group session. Not only will that expert have the requisite skills, but they will also bring some fresh outside perspectives.

Make sure to allocate adequate time to search for potential consultants. Begin with colleagues in other municipalities or organizations to which you belong. Ask for their suggestions about consultants they worked with successfully. Ideally you should seek out consultants that specialize in social marketing or behaviour change or at the minimum have some experience in these areas.

When hiring a consultant, consider the following:

- Identify the scope of the project and confirm the need for a consultant.
- Outline the tasks you want the consultant to perform.
- Prepare a written description of the project scope and timetable.
- Take the time to talk with each consultant you have "pre-selected" and discuss your needs.
- Request proposals from individuals or firms. Give the consultants flexibility to suggest how best to accomplish your goals and objectives
- Evaluate the proposals and check references of previous clients.
- Choose a consultant and enter into a written agreement.

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## **APPENDIX G**

### **FOCUS GROUPS**

Focus groups provide insights into why people do what they do. They involve bringing a randomly selected group of people together and going in detail through a series of questions and scenarios.

Here are some basic tips related to conducting a focus group

- Decide on who you want in your group (e.g. a specific targeted group or a general mix of all ages and gender).
- Find a good, comfortable venue for the session.
- Arrange for a good sound and/or video equipment to capture responses. Always make sure you have the participants' permission to record first.
- Participants are normally paid a small fee (usually \$50-60) to cover their expenses.
- Provide simple refreshments.
- Create a recruitment screening guide, used to screen and select participants based on your established group criteria. If someone is not or will not be affected by a program, their insights really aren't much use to you, however interesting they may be (see sample recruitment guide below).
- Create a moderator's guide that outlines the flow and timing of questions, and ensures that all appropriate topics are covered in the allotted time (see sample moderators guide below).
- Analyse the input received and prepared a summary report.

#### *Strategic Planning Focus Groups*

Focus groups can be used early on in the strategic planning process to determine:

- the level of awareness and knowledge related to the behaviour in question
- perceived or actual barriers to the behaviour
- types of media and messages that are most effective with the target audience

#### *Product Testing Focus Groups*

Focus groups can also be used to test preliminary products as part of the creative design process. In this case, the session will test things like:

- Is the message personally relevant?
- Does the product grab and hold people's attention?
- Is the product visually attractive and appealing?
- Is the message credible?
- Does the target audience comprehend the meaning?
- Is the message persuasive?

## *Focus Group Case Study*

Focus groups were a key component of Stewardship Ontario's E&E Project 199 - Determination of Multi-residential Recycling System Improvements through Focus Groups for Tenants, Building Superintendents and Property Manager Interviews.

Focus groups (16 with residents and 5 with superintendents) and interviews (35 property managers) were held in communities in Eastern, Western and Northern Ontario. Some of the key findings of the study, arising from the focus groups, are as follows:

- Literacy and language barriers must be addressed in designing educational materials by placing emphasis on the use of colour and pictures/illustrations rather than relying on people to read words. Minimize text and target all age levels.
- Enlist residents in identifying and helping building operations address recycling barriers.
- Invite residents to identify most effective spots to post education materials and signage, and ensure that all recycling bins have current labels.
- Provide residents with feedback about the current status of program and set realistic, achievable goals. Communicate the list of major contaminants so that residents can take corrective actions.

The report is available at

[http://www.stewardshipontario.ca/pdf/eefund/reports/199/199\\_final\\_report.pdf](http://www.stewardshipontario.ca/pdf/eefund/reports/199/199_final_report.pdf)

Sample recruitment and moderator discussion guides follow. Feel free to adapt them to meet your specific needs.

## SAMPLE

### Focus Group Telephone Contact Screening Guide

*This guide is adapted from a screening guide developed by Commexus Inc., and used to recruit participants in focus groups for E&E Fund project #68.*

Good morning/afternoon/evening. My name is \_\_\_\_\_ and I am calling on behalf of \_\_\_\_\_. We are currently putting together a discussion group to talk about issues in \_\_\_\_\_. **This is not a sales call nor is there any obligation for you.** The group discussion will last for 2 hours and you will be paid \$40 for your participation. I would like to ask you a few questions to determine how you might fit into our group.

Q1. In what city/town do you live? (list options)

Q2 Do you live in a single family home, a townhouse, or an apartment building? (RECRUIT ONLY THOSE WHO LIVE IN SINGLE FAMILY HOME OR TOWNHOUSE)

- Single family (CONTINUE)
- Single family townhouse (CONTINUE)
- Apartment (TERMINATE)

Q3. Have you ever or do you currently work in marketing or advertising, the recycling field or for municipal government?

- Yes (TERMINATE)
- No (CONTINUE)

#### Q4-7 RECRUIT A GOOD MIX OF PARTICIPANTS

Q4. **GENDER DO NOT ASK JUST RECORD** (50% Men & 50% Women if possible)

- Male
- Female

*Recruiters: IF YOU ARE LOOKING FOR A SPECIFIC GENDER AND THE PERSON YOU ARE SPEAKING WITH DOES NOT MATCH SAY "WE WANT TO MAKE SURE WE GET OPINIONS FROM BOTH MEN AND WOMEN AND RIGHT NOW WE ARE LOOKING FOR MORE WHICHEVER GENDER. IS THERE A (MAN/WOMAN) IN YOUR HOUSEHOLD THAT I MIGHT TALK WITH."*

Q5. I am going to read to you a list of age ranges. Please let me know when I reach your age range (READ LIST)

- Under 18 (TERMINATE) Thank you for your time, however we are recruiting only residents over 20 years of age.
- 18-24     25-34     35-44     45-54     55-69     Over 70
- (Refused) (DON'T READ) - TERMINATE

Q.6 What is the highest level of education you have completed? READ LIST (GOOD MIX)

- Less than Grade 9     High school     College or technical school     University
- (Refused) (DON'T READ)

Q7. Which of the following categories includes your annual income? READ LIST

- Under \$20,000
- More than \$20,000 but less than \$35,000
- More than \$35,000 but less than \$50,000
- More than \$50,000 but less than \$ 100,000
- \$100,000 or more
- (Refused) (DON'T READ)

Q8. In the group discussion you may be asked to make verbal comment. Are you comfortable speaking English?

- Yes (CONTINUE)
- No (TERMINATE)

Q9. In the group discussion you may be asked to write short comments. Are you comfortable writing in English?

- Yes (CONTINUE)
- No (TERMINATE)

(Add details of the focus group location, time, directions to get to the location, start/stop times. Add that this group is to solicit opinions only; taping the sessions for review purposes only but everything the participant would say remains strictly confidential; details on compensation – e.g., \$40 for your participation; and confirm participation – and the following information)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Town/City: \_\_\_\_\_

Phone : Daytime ( ) \_\_\_\_\_ Evening ( ) \_\_\_\_\_

We will be sending you a letter confirming the details we have given you and directions to the location. We will also call you back on the day of the group (fill in date). Can we reach you at the day time number you have given us?

RECRUITER: IF THE GIVEN DAYTIME NUMBER DOES NOT WORK FOR THEM ASK IF THERE IS ANOTHER DAYTIME NUMBER THEY CAN BE REACHED AT OR AGREE TO CALL THEM THE NIGHT BEFORE AT THE NIGHTTIME NUMBER.

PLEASE INDICATE AT WHICH NUMBER YOU HAVE AGREED TO REACH THEM.

RECRUITER "JUST A REMINDER. WE WILL BE STARTING THE DISCUSSION RIGHT AT 7PM SO PLEASE TRY TO BE THERE A FEW MINUTES AHEAD OF THIS TIME. IT IS VERY IMPORTANT THAT THE DISCUSSION STARTS ON TIME AND IF YOU ARRIVE AFTER THE SESSION STARTS WE MAY NOT BE ABLE TO INCLUDE YOU."

"YOU WILL BE ASKED TO LOOK AT MATERIALS SO IF YOU WEAR GLASSES TO READ PLEASE REMEMBER TO BRING THEM."

Thank you!



## SAMPLE

### Focus Group Moderators Discussion Guide

*This guide is adapted from a discussion guide developed by Commexus Inc., and used to moderate focus group discussions for E&E Fund project #68.*

#### PART 1- OPENING REMARKS & INTRODUCTIONS (10 MINUTES)

Begin with an introduction. Thank them for coming. Ask them to fill out the tent card in front of them with their name so the moderator and other participants can address them in the way they prefer.

Offer them an outline of the logistics (washroom locations, refreshments, rules and agenda.)

Explain more about the evening:

Make these additional points:

As you have noticed we are recording this session. My colleague on the camera is (name). I want to assure you that the tape is only to capture your input and will be used for analysis purposes only. No other use will be made of this information. No one will ever know what you personally said, only what everybody's combined responses are. So please speak freely and frankly.

*(In the case where others may be viewing from a different room, participants should also be informed that some members from this project's partner organization are viewing this discussion in another room merely to get an immediate feel for your opinions and concerns.)*

If consultant moderating - Explain that you don't work for your municipality and therefore, I won't be able to answer any specific questions about your community's recycling program. However, if you do have a question about the local recycling program, I will ask you to write the question out, along with your name and phone number. At the end of the session I will collect your questions and pass them on to someone from your local municipality so that they can contact you directly with a response.

**Group Introductions.** Ask the group to introduce themselves and as they do so, have them tell you how many people are in their household.

#### PART 1- QUESTIONNAIRE (10 MINUTES)

Point out the questionnaire. Ask the participants to fill out the questionnaire if they have not already done so. Allow 10 minutes for this task if needed.

#### PART 2 – GENERAL RECYCLING INFORMATION (30 MINUTES)

Explain to the group that you are going to ask them a series of questions, and you would like them first to jot down their responses on the paper provided. Explain that you will collect their responses in a couple of minutes.

Post the questions on chart paper. Collect the responses from the group one question at a time. Ensure that all responses are gathered before discussing the responses. Discuss only these responses that require further explanation or description. For each of the sets of responses, ask questions to determine the "why" behind the responses when appropriate.

##### Question 1

Divide a chart page into 2 columns, label the columns A) reasons for recycling, B) reasons for not recycling. Post the question: Thinking about recycling, in your personal opinion:

**What reasons do you think people have for recycling and what reasons do they have for not recycling?** Gather all the input from the group on the chart page. Clarify any points that need more information - be sure you understand the thinking behind the points raised.

##### Question 2

Now, using another clean page of chart paper - post question two, ask the group to think about this question and jot down one or two ideas:

If you were managing a recycling program in your community, and you knew that some people were not participating in the program - what would you consider the most effective way to encourage and motivate them to participate? Gather input and discuss to clarify the thinking behind the responses as appropriate.

### Question 3

Now, using another clean page of chart paper - post question three and ask the group to jot down their ideas: (after responses are gathered ask why/why not)

Does what you hear, read or see make a difference in whether you recycle or don't recycle?

*Five minute allowance in the timeline - may be used for coffee or stretch break.*

### PART 3 – GENERAL RECYCLING INFORMATION (40 MINUTES)

Ask the group to think for a moment about what makes them value things.

"When you value something you pay attention to it. It is the same with communications. We all get a lot of information, hear and see many communications each day. Some are in print materials, some on TV and the radio. Some print information for example, we barely notice and others we clip out, post on the fridge. Some TV and radio advertisements, or programs we don't even seem to hear and others we hum in the car or can recall clearly at a later point. Thinking about communications you have heard, read or seen from any source and **about any topic** - jot down the things about those communications that made you pay attention to them - made you value them in some way."

Once the group has written their lists, gather the information the group provides. When the list is complete, ask for clarifications and the "why" behind the ideas on the list as is appropriate.

Now, thinking about the communications you valued enough to pay attention to / to remember, what are the characteristics of those communications that would prompt you to act on them, or learn from them in some way?

Once the group has written their responses, gather the information the group provides. When the list is complete, ask for clarifications and the "why" behind the ideas as is appropriate.

Now, thinking about any communications **on any subject** that you have received in the past, think about any you have kept - advertisements, information pieces, booklets, etc. Think about why you kept them - describe your reasons for keeping them.

Gather the information the group provides. When the list is complete, ask for clarifications and the "why" behind the ideas on the chart as is appropriate.

Now suggest that as a group you would like them to think about and offer ideas about how they would describe the **IDEAL** communication about recycling. Ask them to describe a communication that they would **MOST** value - use the following parameters

- What media is used for the "ideal" communication?
- What does it look like? - describe the visual characteristics.
- What does it contain? - describe the characteristics of the information in the communication.
- How valuable is a reminder or follow-up communication on the same topic?

### PART 4 – EVALUATING EXISTING MATERIALS (20 MINUTES)

Divide the group into pairs or triads. Pass each pair or triad their envelope. Ask each person in to fill in one of the forms enclosed in the envelope as they look at the materials. Ask them to evaluate the materials in the envelope using the guidelines on the form. Explain that each piece is labelled with a letter. Show the group an example. Explain that the form is lettered as well. Ask them to fill in their comments on the material following the letter code.

When the forms are filled in, thank the participants for their co-operation, time and attention. Gather all their notes. Issue each person his or her honorarium and close the session. Remind if there are any questions for local municipality to write their question, their name and phone number and leave it with you.

### FORM FOR MATERIALS

Please examine the material in your envelope

1. Would this information piece attract your attention?

Yes  No

2. Why or why not?

---

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3. Does the headline make you want to read the text?

Yes  No

4. Please read the text and answer the following:

i) Is the text written in a manner that makes it easy to understand?

Yes  No

ii) Is the amount of text

too much  too little  just right

iii) Does the text direct you to take specific action(s)?

Yes  No

5. Please tell us would the material **encourage** you to take the action(s) it is promoting?

Yes  No

Why or why not ?

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## APPENDIX H

### WORKING WITH THE MEDIA

Working effectively with the media is one of the most critical and yet overlooked or underutilized components of any P&E strategy. DON'T make that mistake yourself. Two key things to remember about your local newspapers, radio and television stations and less traditional media (community web sites, newsletters blogs etc) are:

- You can often get these outlets to mention what you want FOR FREE (i.e. as a news story)
- People often respect a news item than a paid advertisement.

However, a broadcast email or fax with a bit of text about your new campaign is not likely to generate free, accurate coverage! You will need to:

- Work with your media contacts
- Cultivate a relationship with them
- Give them what THEY need

REMEMBER – your local media can give you **good** or **bad** coverage (whether intentionally or not). Which type of coverage you get may well depend on how hard you have tried to cultivate a relationship. Good coverage can be great, free promotion, but bad coverage can be devastating. With a good working relationship, they just might check with you to get their facts straight before running a negative story.

#### CULTIVATING A RELATIONSHIP

- Find out who the local editor and relevant reporters are, and set up a meeting (lunch?) to ask them what you can do for them
- Make note of their deadlines, how they want text, photo and graphic files
- Ask them what days/times are best for press conference and photo opportunities
- Spend the time and effort to create dynamic press releases with strong and varied photo opportunities
- Sometimes you may need to give exclusives to get guaranteed coverage (at least with print media), but alternate exclusives between media outlets
- Always let the editor or reporter know if you are running ads with them, and roughly how much
- Be nice, even when they get things wrong – you are building a long-term relationship
- Do as much work as you can for the reporter, to make their job easier and them look good
- Whenever possible, get materials to them **before** deadlines, not at the deadline,

## **MAKING PRESS RELEASES/CONFERENCE WORK**

- Treat them well (coffee, treats, press package, background information)
- At a media event, create a few different strong photo opportunities for the media to choose from. Include kids if you can, but where possible limit the number of main people to 2 or 3. Be prepared to get creative, or even silly. Bring a range of props. Then work with the photographers to create something that works for them.
- Make sure there is a good local angle to the story
- Provide strong human interest hooks and quotes from local people and experts
- Keep the release tight so they can quickly grasp the story, and provide additional background information or links separately
- Give them at least 7 days advance notice, and then a telephone or email reminder the day before

## **OTHER MEDIA TIPS**

- Provide small graphics for them to use as fillers
- Take full advantage of all Public Service Announcements (PSA)
- Make sure your media list is complete and current – they change all the time. Use a summer/coop student to get it updated, and/or ask to get copies of media list from other active NGO's or community groups
- Don't forget all of those free community newspapers
- Provide generic ("canned") copy relevant to the season (environmentally sensitive gift giving, composting in spring etc)
- Assume you are "on the record" at all times, unless you have REALLY earned the reporter's trust
- Email or phone a thanks when they provide good coverage, and provide a tactful correction when they don't
- If they have actively partnered with your program, consider giving them a plaque or certificate of appreciating
- For radio PSAs, get someone who generally cares about or is involved with recycling to record the message, not just an announcer (but make sure they have a decent radio voice)
- Provide short seasonal articles for general use as fillers by all print media, including small local newsletters from community groups and associations, churches or any other potential organizations.

## **HOW TO DEAL WITH UNEXPECTED PUBLICITY**

It has been said that there is no such thing as bad publicity because it increases the chances resident are talking about you (or your program). That might apply to aspiring rock stars but in your ongoing efforts to win public support for behaviour change, you don't want your credibility weakened. So consider the impact on your program from the coverage.

There is a difference between a breaking hard news story that involves a real problem with your program and an article that gets the facts wrong or simply expresses an opinion. Know which you are dealing with, and respond appropriately.

If you are getting bad publicity because your program has a problem (injury, fire, undue contamination etc), your media response is part of managing the problem itself. The first step is to stay calm, get the facts and inform. Take the time to understand the situation and the exact nature of what has in fact happened. Don't guess. Politicians and senior staff do not like surprises. If one or more residents will be impacted directly, let them know where possible, rather than let them read or hear about it in the media.

When a reporters calls, you or your spokesperson should avoid the "no comment" line. It just sounds too cagey. Instead, promise to get back to the caller in 5 or 10 minutes. If more time is needed to consider a response, suggest when you will call back or send an extended statement. Take the caller's email address. This gives you the chance to work out your statements and review them before going on the record.

If the problem is an error on the part of the media, take the time to address the error. Start with a a letter to the editor. There's probably more chance of your letter being read than a small correction notice buried on page 16. Papers should, in theory, print a correction on the same page as the page that the error occurred, but that doesn't always happen.

Be careful of your tone. You don't need to make enemies of your media colleagues. Rather than the "you messed up" approach, try something like "I would just like to clarify the city's position on the XXX issue...". That gives you a chance to place the matter in context again, something that would not likely happen with a three-line correction notice.

If it's an opinion piece or a letter to the editor that is slamming you or your program, again, take the *clarify* approach, not the "he said, she said.." line. If there are general complaint letters ("I pay taxes, why should I sort my garbage?"), try to have someone else respond from a societal, "we all live on this planet" angle. This could be a volunteer, someone who is supportive or even a councillor or committee member. If however, the writer states a glaring error in his/her letter, then you have a chance to write a clarifying letter which you can then use to re-promote your program.

## **OTHER RESOURCES**

Getting Your Message Out Through the Media, by Nadra Kline Weinrich, at [www.social-marketing.com](http://www.social-marketing.com)

Media Relations: Tips for Working the Media and Getting Your Message Out More Effectively, at [www.writing911.com](http://www.writing911.com)

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# APPENDIX I

## PRE-TESTING

### TYPES OF PRE-TESTS

#### *Readability Testing*

- Determines reading grade level of text
- Is inexpensive and quick, but need a trained staff using a readability formula
- Does not measure a reader's understanding
- Normally, materials should be targeted to grade 9 or lower

#### *Expert Reviewer*

- obtains reactions from experts in the field, partners or senior staff
- allow sufficient time to design a series of questions and associated response form, conduct reviews and tabulate results
- best delivered in person (one-on-one or in small groups) but can be done as self-administered survey provided the survey questions are clearly structured
- consider including teachers (for comments related to the curriculum) or other local groups who work with your target audience

#### *Focus Group*

- obtains insights into perceptions, beliefs, values and learning patterns
- 8 to 12 participants to group, and ideally 4 or more groups
- will take 4 to 8 weeks to create, outline, arrange, recruit, conduct, analyze and report
- requires trained focus group professional to conduct and moderate
- [see Appendix G for more on Focus Groups](#)

#### *Individual In-Depth Interviews/Surveys*

- probes individual attitudes, beliefs and perceptions
- requires a properly designed questionnaire
- should target 10- 25 respondents
- typically takes 4 to 8 weeks from design to compilation of results
- time consuming, and can take many tries to find individuals willing to dedicate the time
- may not provide true representation, as only some types of people have the time and interest to participate in an in-depth survey
- [see Appendix E for more on Surveys](#)

#### *Central Location Intercept Interviews*

- obtain quick reactions to concepts and messages from many respondents at central location (e.g. a mall)
- can get information from many basically random people in a short period of time
- can only get answers to a very few questions

- use only close-ended questions

### *Theatre Testing*

- obtains reactions to concepts and messages from a large gathering of people at one time
- should be designed and conducted by a trained survey professional
- need some incentive to get the respondents to the theatre location, unless you can piggyback it on another event
- does not allow for much discussion, rather just gut reactions

### *Self-Administered Surveys*

- uses pre-designed questionnaires that can be either mailed or given to resident during intercepts to fill out and return
- expect a low return rate, so plan to give or send out a large number of surveys

## **PRESENTATION OF MATERIALS AT PRE-TESTS**

### *Print*

It is best to test a complete prototype of the final material. Avoid testing text in manuscript form. Word-processing software makes it very easy to put the text into the intended layout, and testing a prototype instead of a manuscript will allow you to more accurately assess comprehensibility.

### *Audio*

Even if you only have a script, produce and test a "scratch tape" so that every pretest respondent hears and reacts to the same thing.

### *Video*

Storyboards are too rudimentary to predict reactions to the final product. More useful formats are:

- Animatics - a series of detailed drawings, filmed in rapid succession and using camera zooms and pans to give the illusion of motion
- Photomatics - similar to animatics, but using a series of photos
- Rough live action - filmed footage, with costs controlled by using nonunion talent and simplified sets
- Ripomatics - adaptations or alterations of existing footage to create a new video product

### *Interactive (e.g., Web, CD-ROM)*

The site or program should be complete enough to allow basic functionality and design to be assessed.



## **CONDUCTING PRE-TESTS**

When conducting pre-testing, consider having creative professionals, content experts, partners, and/or senior staff members observe at least some of the sessions. Creative professionals' observations are particularly important because they often spot comments or trends important for creative development. Having partners or senior staff observe a pre-test session can illustrate, more vividly than any report, the challenges being faced and the solutions required.

Look for general agreement or consistent responses among participants. If possible, pretest in more than one location and with more than one method.

## **PRE-TEST REPORTING**

If you have the time and budget, develop a working report from your pre-test section with the following sections:

- **Background:** Who was tested? Why? How? What were your research questions?
- **Highlights:** Summarize the main points that emerged responses to the research questions.
- **Findings:** Describe participants' reactions, quote participants, and provide examples from the test documents.
- **Conclusions:** Describe patterns that emerged or significant differences observed between groups.
- **Recommendations:** Suggest revisions for materials or planned approaches based on findings and conclusions.

## **APPLYING PRE-TEST RESULTS**

Review all recommended revisions. If minor revisions only are required, make them and proceed to either a second small pre-test or proceed to your program launch.

If the pre-test showed that respondents were unable to comprehend the message(s) or action requested of them, or found the delivery mechanism was totally unsuitable, you will have to step back and make a decision whether to revise or completely revamp your message and/or approach.

## PRE-TEST CASE STUDY

This story comes from Doug McKenzie-Mohr's Community-Based Social Marketing website ([www.cbsm.com](http://www.cbsm.com)). Although not directly related to recycling P&E, this summary provides insight into the usefulness of pre-testing.

The *Turn it Off Project* applied methodologies of social marketing techniques to encourage members of the public to avoid idling their engines while waiting in their vehicles. Sites at schools and Toronto Transit Commission (TTC) *Kiss and Ride* lots in Toronto were to be used for the pilot and *prompts, commitment* and *norms* were the tools to be piloted.

The idea was to use signs to prompt motorists to remember to turn off their engines, and, initially, pledge cards to add commitment. It was thought that making these commitments public might assist in the development of community norms that turning off an engine is "the right thing to do." But first, pre-testing was done to see if the idea would fly.

The organizers were looking for feedback from typical drivers on the proposed strategies and communications materials for the pilot. Focus groups were conducted, two of these sessions involving drivers who drop off/pick up children from schools, and one involving drivers who drop off/pick up passengers at a the *Kiss and Ride* area. Various suggestions were made regarding the proposed graphics and communications, but once discussion came around to the anti-idling pledge card that had been prepared, participants expressed concerns that drivers may feel uncomfortable because of privacy issues.

As a result of this feedback, the following communications methods were developed:

- "No Idling" Signs – A minimum of four temporary signs were prepared for each location to encourage drivers to turn their engines off while waiting. These signs were mounted on concrete bases so that they could be placed in highly visible locations at each site.
- "No Idling" Window Stickers – Commitments in this project were obtained and made public by asking motorists to place a sticker in their window that said "*For Our Air: I Turn my Engine Off When Parked.*" (Note; there was no need to sign anything – less of a commitment perhaps, but less intrusive.)
- Information Card – Motorists from whom commitments were sought were also provided with an information card that indicated that reducing idling would save money, reduce air pollution and decrease greenhouse gas emissions.

The pilot study looked at three situations: one where only the anti-idling signs were installed; one where signs were installed and stickers and information on idling given to motorists and one area where nothing was done; it acted as a control site.

It turned out that the signs alone had no impact on idling but the combination of signs plus the stickers and information reduced idling incidences by up to 51% in a school zone, and by 27% in the Kiss and Ride lot. In both locations, the duration of idling was also reduced – by more than 70%.

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# WORKSHEET 1

## GOALS, OBJECTIVES AND ACTION PLAN

*Note: Start with Objective and Goals. Then, once you have gone through the next few steps of the planning process, you will be in a better position to come back and fill out the actions that are required. You may need to adjust/expand the form to suit the number of objectives, and provide for multiple actions per objective.*

|  |             |             |
|--|-------------|-------------|
| <b>Goal Statement:</b> What overall change do you want to see? |             |             |
| <b>Objectives:</b> How will you make that change happen.       |             |             |
| Objective 1  | Objective 2 | Objective 3 |
| Action 1:<br><br>By Whom:<br>By When:                          |             |             |
| Action 2:<br><br>By Whom:<br>By When:                          |             |             |
| Action 2:<br><br>By Whom:<br>By When:                          |             |             |

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## **WORKSHEET 2**

### **DEVELOPING MESSAGE CONCEPTS**

*Complete a separate sheet for each target audience.*

1. What action do I want my target audience to take?

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2. What is the benefit to the target audience for performing the action?

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3. What are the barriers and how will I minimize them?

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4. How can I make our message credible?

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5. What communication tools and delivery medium (media) will I use?

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6. What tone or style should my communications have? (Serious, humorous, etc.)

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7. What images can I use to enhance the action?

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## WORKSHEET 3 PRINT PRODUCTION SCHEDULE

*The best way to determine a production schedule is to work backwards. Decide when you need the finished product, and work backwards, step by step, to allow time for each stage. Always build in more time than you anticipate for contingencies. Create a schedule for each print product that is part of your campaign, and make sure to refer to it regularly.*

Job name:

Municipal Contact Person:

Municipal Contact Phone:

Municipal Contact email:

Printer Contact Person:

Printer Contact Phone:

Printer Contact email:

Budget Amount:

Printed Material Delivery Date:

| Activity                                   | By Whom | By When | Status |
|--|---------|---------|--------|
| Identify potential printers                |         |         |        |
| Obtain quotes                              |         |         |        |
| Select printer                             |         |         |        |
| Pre-production meeting with printer        |         |         |        |
| Get final design materials to printer      |         |         |        |
| Receive 1 <sup>st</sup> proof from printer |         |         |        |
| Review and provide revisions to printer    |         |         |        |
| Receive 2 <sup>nd</sup> proof from printer |         |         |        |
| Review and provide revisions to printer    |         |         |        |
| Receive Final Proof from printer           |         |         |        |
| Review final proof-sign -off               |         |         |        |
| Delivery of finished material              |         |         |        |

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## WORKSHEET 4 VIDEO/AUDIO PRODUCTION SCHEDULE

Job Name/Description:

Department Contact:

Address:

Phone:

E-mail:

Purchase Order

Production Company Contact:

Address:

Phone:

E-mail:

DELIVERY DATE: \_\_\_\_\_

| Activity                           | By Whom | By When | Status |
|------------------------------------|---------|---------|--------|
| Select potential production houses |         |         |        |
| Obtain quotes                      |         |         |        |
| Review final script                |         |         |        |
| Sign off on talent selections      |         |         |        |
| Review shooting schedule           |         |         |        |
| Shooting and recording             |         |         |        |
| Review and sign off on narration   |         |         |        |
| Review finished production         |         |         |        |
| Delivery of final production       |         |         |        |

Budget Amount: \_\_\_\_\_

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## WORKSHEET 5

### INTERNAL COMMUNICATIONS/TRAINING PLAN

*This worksheet can be used to make sure that your municipal staff and partners (including private sector waste and recycling contractor staff) are aware of your program and impending program changes. This is essential to ensure that residents get a consistent message regarding your program. Modify the form as needed to meet your specific needs.*

| Checklist   | Schedule  |                 |     |
|---|-----------|-----------------|-----|
|   | completed | to be completed | n/a |
| Determine internal targets <ul style="list-style-type: none"> <li>• primary (need thorough understanding)</li> <li>• secondary (need overview)</li> </ul> |           |                 |     |
| Talking point document created  |           |                 |     |
| Telephone answering guide created   |           |                 |     |
| Program schedule developed  |           |                 |     |
| Staff training session set  |           |                 |     |
| Program material distributed  |           |                 |     |
| Information for website created   |           |                 |     |
| Text for internal newsletter created  |           |                 |     |
| Feedback tracking form created  |           |                 |     |

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