Measuring Impact of Low Carbon Social Mobilization Initiatives

WORKSHOP SUMMARY REPORT

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Introduction

A core pillar of CEKAP's mandate is to facilitate knowledge exchange between communities of research, policy and practice. In line with this mandate, on October 12, 2018, CEKAP hosted a half day workshop "Measuring Impacts of Low Carbon Social Mobilization Initiatives" at OCAD University. The workshop was part of the broader [2018 Ontario Climate Symposium "Adaptive Urban Habitats by Design"](#).

The purpose of the workshop was for academic researchers and social change practitioners to come together to explore approaches to evaluating the impact of low carbon social mobilization initiatives, as well as explore what role academic researchers could play to support and/or enable ongoing experimentation and measurement of impacts of existing and emerging models. The 50+ workshop attendees represented a diverse group of non-profit organizations, local government, academic researchers, consultants, and others involved in the low carbon social innovation space.

The workshop began with a series of context setting presentations from leading scholars and practitioners in the low carbon/sustainability social mobilization space. Links to each presentation are below:

- [Dr. John Robinson, University of Toronto – Social Mobilization and Sustainability Transitions](#)
- [Sonya Meek - Senior Manager, Sustainable Neighbourhoods, Toronto and Region Conservation Authority – Sustainable Neighbourhood Retrofit Action Plan (SNAP) – Measurement Strategies and Needs](#)
- [Katie Harper – Executive Director Project Neutral – The Practitioner's Dilemma](#)
- [Dr. Stephen Sheppard, UBC Centre for Advanced Landscape Planning – Learning from BC's Social Mobilization Research](#)
- [Steve Williams, UBC – A Framework to Evaluate Low-Carbon Energy Transition Learning Projects](#)

Following the presentations, workshop participants were asked to reflect on a series of questions related to measuring impact of low carbon social mobilization initiatives individually, and in groups:

1. [How can we foster effective community action and scale it up?](#)
2. [How do we evaluate not just short-term proximate effectives, but longer term impact in terms of systemic social-cultural change?](#)
3. [How can we report on impact for multi-objective projects?](#)
4. [If you have experience trying to evaluate contribution to systemic change or scaling up impact, what kinds of methods, data and approaches did you find useful?](#)

Notes from the breakout discussions were compiled, and are presented here as a summary to support further reflection and discussion around this important topic.

Key Takeaways from the workshop:

- Workplace engagement on sustainability behaviours can be an important channel to leverage, given the amount of time people spend at work and the power of social norms in work environments
- Top-down policy change on its own is insufficient; it needs to be complemented by bottom-up community development efforts to motivate behaviour change and socialize new pro-sustainability norms
- Long term social- cultural change can be achieved by seeing changes in structures and it will be intergenerational also, new technologies are encouraging greater social and cultural shifts (e.g. Renewable Energy).
- There needs to be several different methods of reporting the impact of multi objective sustainability projects (e.g. qualitative, and quantitative metrics). This will ensure maximum impact of reporting and will meet the needs of various stakeholders.
- There is opportunity and interest in creating a social mobilization community-of-practice to help increase the skills and capacity of social change practitioners, and build the necessary ecosystem of support from other stakeholders (e.g. academic researchers, funders, policymakers, etc.)
- The theory of change approach, which requires upfront identification of desired impact and the indicators by which progress can be tracked, can be a powerful tool for helping to communicate to a wide range of audiences.

Breakout Discussion Summaries

Q1. How can we foster effective community action and scale it up?

Defining Community

It is critical to start by developing an understanding of the community you are working within (e.g. demographic and socio-cultural profile). Tools such as the Environics PRIZM spectrum helps to identify where environmental awareness is greatest and hence making it easy to focus more resources to this particular community. Thereafter, social change practitioners can shape their interventions to align with common interests, goals and shared values.

Once common interests, goals and values are identified, practitioners can build relationships through targeted and strategic engagement. Note that in socially isolated communities it may take years of engagement to build social connectedness before tangible collective projects emerge.

It is also, important to leverage pockets of institutional support, such as in education, health and commercial sectors. Bring top-down organizations and bottom-up communities together so they can co-develop the planning and implementation of new policies, e.g. Transform TO's climate action plan includes health, equity and prosperity which brings in greater support from diverse communities. It is important to build on existing work.

One of the strongest communities most people belong to is their workplace where they coordinate their individual efforts to realize an organizational vision or goal. Workplace engagement on sustainability behaviours is an important channel to leverage, and may result in cascading change in other areas of

life. It is important to leverage this cohesion. The same applies to other "communities", including faith-based, and neighbourhood-based communities where social change can be mobilized through local community champions.

Engagement

It is necessary to continuously engage with target communities by leveraging existing webs of inter personal connection. Storytelling by trusted local community members can be a particularly powerful way to build momentum. The person telling the story can become a low carbon lifestyle messenger or ambassador for a particular community. When engaging, choose topics almost anyone can relate to or view positively, e.g. sitting under the shade of a tree on a hot summer day… Scale it up by engaging with the "Same Ten People" and empowering them to become champions and ask them to find "New People" to empower with the knowledge. For example, "Circle-of-Mentoring" example ("My World My Choice"): University of Waterloo students are great mentors in the eyes of the high school students they mentor, who in turn become mentors for middle and primary school students. They are currently exploring the opportunity for middle and primary school students to take their environmental projects into their parents' workplaces as "lunch 'n' learn" style presentations, prompting employees to consider what they can be doing to improve the adoption of low-carbon lifestyles (e.g. "If a kid can do it, why aren't we?")

Other suggestions for continuous engagement with the community include building events around things people already enjoy doing i.e. experiential learning, gamification, friendly competition, fitness, biking, hiking, making art, sustainable cooking, urban discovery walks, nature discovery walks, live music etc. Also, the use of visual media to plot positive and negative ways that climate change may impact the community can be used to spark problem-solving discussions e.g. UBC's "Coolkit" activity of using local maps and drawing areas of higher/lower resilience to climate impacts.

Do not neglect to identify and mitigate where possible any barriers that may hinder the building of a relationship with a community (e.g. timing of engagement events, having online and in-person engagement activities). Also consider the size of an engagement activity, and aim for approaches that allow for human to human contact.

Q2. How do we evaluate not just short- term proximate effects (i.e. Energy and GHG reduction) but longer- terms of systemic social- cultural change?

One needs to define the desired social-cultural change, and develop an evaluation plan very early on to track progress towards identified objectives.

We might look for the development of 'communities' – i.e., groups with shared interest. E.g., in some cases we identify community-level captains or champions to help drive change at a neighbourhood level. *If* we see social-cultural change, we would expect that role to be easy to fill if the champion moves. For social-cultural change we need to see changes in the structures that guide behaviour. For example, if social-cultural change has occurred, we would expect to see that job descriptions, and institutional mandates, have changed.

Longitudinal evaluation of norms, and especially looking for 'relapse' (e.g., someone rides their bike for a year, and then falls back into the habit of driving). For this we could design short term interim surveys around values, behaviours, intentions – which might feed short-term evaluation – but set up the study to be repeated on a regular basis. Could also do continuous tracking of the creation of new ideas/ practices shared through networks of media, social media & others

Social-cultural change is intergenerational. So if social-cultural change has occurred, we would expect to see teachings based down from generation-to-generation in the home as well as in the classroom.

Short- Term Behavioural Shifts vs. Long- Term Social Change

In the short-term it is easier to evaluate the relationship between inputs and outputs, but harder to evaluate deep structural change. In order to evaluate long term effects of systemic social cultural change, one needs to define from the outset what the theory of change is for the initiative, and the predicted impacts on the target audience, including social quality of life and resiliency.

The accessibility of new technologies can open the door for social and cultural shifts I.e. renewable energy is becoming more affordable and this is making it possible for more people to use it when perhaps they wouldn't have years ago. While technology adoption doesn't itself result in an individual's behavioural shift, it can enable greater socio-economic and cultural shifts in the long-term. For example, if everyone is driving electric vehicles and using renewables, infrastructure changes to accommodate and furthers this shift in social norms.

Community Development and Institutional Change

It is important to recognize that high level, top down policy change doesn't necessarily lead to changes in institutions and at the community level. Policy implementation often suffers, because insufficient resources or capacity is invested to make it happen. High-level policy changes need to become embedded or standard practice. For example, Social housing managers need to be aware of energy savings opportunities, and have the financial and technical capacity to make investments, in order to be able to make real and lasting change happen.

To ensure we have systemic social- cultural change, we need to continuously motivate people to make improvement in their lifestyle, as there is a possibility for relapse i.e. you get someone to use their car less for a few months but will this may be a short term change and 5 years from now they may continue to use their car regularly. Perhaps we can change social norms on this I.e. Anti-smoking campaigns or birth control or gay marriage are all examples of ways that we have used 'peer pressure' or social norms in order to get people to stop or change their ways. Another solution is to appoint trusted community captains, these captains could be a friend, family, leader, celebrity in the community who is there to ensure there is little or no relapse and this community captain can be a role that can be passed on to others over time. To ensure long term systemic social cultural change there should be continuous tracking of the creation of new ideas/ practices through networks of media, social media & other to ensure the community is involved. Design short term interim question around values, behaviours, intentions and have this as a constant evaluation for several years.

Traditional Ecological Perspectives as a Guide

From a TEK perspective – the Indigenous have always lived in an organic way. When they think about climate change, they see society trying to revert back to simplicity i.e. Organic foods. Currently indigenous communities are relying on store bought food because of the lack of supply in organic food. This has caused indigenous communities to spend more money due to high fuel prices, increasing transportation costs. The indigenous elder believes that intergenerational change will happen if we keep teaching future generations about the shifts in sustainability that need to happen. For example, Land use planning – trying to get people in the community to care about it by running focus groups to talk about these issues in the community. No matter who comes it is necessary to get different perspectives and it is important to listen actively, as this is important to foster and give opportunities for people to be heard.

Q3. How can we report on impact from multi-objective projects?

Audience Segmentation

It is important to recognize that there are many audiences and different objectives of reporting. For example, informing funders, public or other interest groups. Therefore, it is necessary to acknowledge that there can be many different lenses for reporting on the same project. In order to meet the needs of different audiences, there is a need to categorize the relevance to each group in a chart to help frame the analytical lens. Also, it is a good idea to set expectations early on what will be reported back to each audience.

Quantitative and qualitative reporting

We need to provide several different methods of reporting. It is important to include both quantitative and qualitative data. Qualitative is necessary because reporting on the monetary value of ecological or social impacts is not effective for e.g. valuation of Eco services.

Storytelling as a reporting mechanism is increasingly accepted as it makes a report personally relevant and allows for information to be packed together in a digestible way. Similarly, visual representation of information is desired by evaluation audiences. Storytelling and visualization needs to be supported by data to ensure accurate representation. Funders will still want the numbers to back up the qualitative narrative however.

Reporting on the monetary value of ecological or social impacts was not seen as an effective approach (e.g. valuation of ecosystem services). Monetary valuation is less well understood when related to more intrinsically valued systems.

Relationships are the strongest measures of success, yet are not often measured as an outcome/impact of project implementation.

Sustainability Social Mobilization - Community of Practice?

There is an opportunity to work as a community of practice to promote the overall brand of integrated, multi-objective social mobilization projects, rather than only continuing to repackage reports for reporting back to various audiences. It is important to co-create the expectations for reporting as a multi-sector project team. Therefore, reports need to be kept simple and only focus on the primary messages and highlight the extra information. If possible, try identifying existing partners and research rather than reinventing the wheel, also this could help spread out the reporting too.

However, we should recognize that while many funders acknowledge the importance of multi objective approach, funding criteria often make it difficult to raise money to pay for project implementation & evaluation. Therefore, it is necessary to set multi- criteria analytic frames and take time to analyze/ synthesize & package results in ways that are relevant to different audiences.

Q4. If you have any experience trying to evaluate contribution to systemic change or scaling up impact, what kinds of methods, data and approaches did you find useful?

Importance of Indicators

In order to evaluate contribution to systemic change or scaling up impact, we first need concrete, substantial interventions and we need to ask what the narrative of concern is. These substantial interventions and questions will enable us to design a methodology that will be useful to evaluate the larger climate change narrative and help us follow that narrative in order to be successful in creating systemic change or scaling up impact.

Thereafter, identify leverage points, triggers, benchmarks, incremental change points and indicators along the path and along the transition management pathways. This process is important because it will help build a capacity for ownership and thereafter, help build pressure that will lead to cultural change. These indicators should include metrics to understand the capacity to collaborate, bring people together and engage in dialogue—to ask if we have the seeds of long-term change. For example, the Tamarack Institute has readiness metrics, looks at collective impacts and runs contribution analyses, using immediate to more distant indicators. Others are Environics and EcoAnalytics—they assess how Canadians are thinking about the environment. What are the general, baseline attitudes? What are people's concerns? If it's mainly health-related, then how can we frame climate change to show the effect on health and quantify the health costs to show the advantage of retrofits? The idea is to look for these sweet spots and help determine what kinds of methods, data and approaches are useful.

It is important to ensure climate plans are adaptive and reflexive due to uncertainty. It is helpful to partner with others, as sometimes you may not be able to evaluate systemic change as effectively alone. It is also important to note that systemic change requires thinking of incentives (money) and regulations (taxes). For example, Nova Scotia had a financial mechanism (gas tax) to encourage climate action (a "stick" or incentive). Note in order to achieve the results fast enough there are trigger points in municipal government—capital spending, asset management, land use policy—these are opportunities for interventions or "mainstreaming climate change" into operations. Therefore, you need to look at the incremental change points at the municipal level. But if we want transformational change, we have to do things differently; it requires a cultural transformation.