

Best Practice Guide to Designing and Operating Climate Change Pledge Schemes

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Climate Change Pledge Schemes**

**Commissioned by the Department for Environment,
Food and Rural Affairs**

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Background and context

The Department for Environment, Food and Rural Affairs (DEFRA) commissioned the Central Office of Information (COI) Strategic Consultancy to examine how the effectiveness of climate change pledge schemes could be improved.

There are many on-line pledge schemes active in the UK. They vary from those focussing wholly on local communities to those that are targeting the whole of the UK. The scope of this report is limited to schemes targeting citizens, rather than organisations, and a 'pledge scheme' is defined as '*an invitation from an organisation to an individual to make a public commitment to a behaviour change in relation to climate change*'.

The project has explored how existing schemes work in order to identify current best practice and understand how pledge schemes can operate more effectively in the future.

This document is a Best Practice Guide to Designing and Operating Climate Change Pledge Schemes, and has been developed in discussions with operators of pledge schemes of various types and sizes.

COI and DEFRA would like to thank everyone who has contributed to the development of the guide to date. A full list of interviewees and workshop attendees can be found in the appendix.

Using this guide

The purpose of this guide is to provide practical advice on designing, setting up and running a pledge scheme, based on the experience of a number of practitioners. It contains guidance on all elements of running a pledge scheme, from operations to measurement to promotion.

The document has been laid out to guide you through the process of developing your pledge scheme in a logical, step-by-step way. The contents have been arranged in the order we believe you might use them, with each chapter building on principles outlined in the previous.

'Key points to consider' are highlighted in a box at the end of each chapter to remind you of the most important points in each section.

1. Before you get started...

Once you have decided that you want to set-up a pledge scheme it is worthwhile taking time to think about the best way to run it – this will make sure that it is effective and efficient, and will prevent you from running into difficulties later on.

First of all, researching existing pledge schemes could save you time and money. Before developing your own scheme, you could consider:

- Joining a large national scheme and tailoring it for your own use
- Promoting an existing scheme to your target audience
- Asking other schemes for information and advice
- Setting up a scheme in partnership with another organisation or region in close proximity or with shared objectives
- Using existing supporting tools (e.g. Act On CO₂ Calculator) rather than developing your own

If you do decide to set up your own scheme, we would advise you to think about the following:

a. Key partners

- Find organisations and institutions with an interest in climate change – they can help you by:
 - Funding the scheme
 - Helping to set up your scheme – universities in particular are a good source of technical expertise and volunteers
 - Providing publicity
 - Acting as ambassadors for the scheme
 - Providing local knowledge and sharing speakers and resources

b. Process requirements

- Spending time fine-tuning the process up-front will pay off – building in change later will be expensive. For example, will you want to communicate with your pledgers over time?
- Also consider whether you will need to pilot your scheme or conduct any baseline research before the scheme is launched

c. Resources

- It's not only the set-up and launch of the pledge scheme that requires a commitment of time and resources; running pledge schemes can be time-consuming – make sure your team can cover the ongoing work
- Budget for any website development, events, materials or incentives up-front

d. Coverage

- Will your scheme have a local or national focus?
- The team spirit generated by schemes targeting local communities or groups with common interests can be very motivating

Key points to consider:

- Could you adopt an existing pledge scheme rather than designing a new one?
- Have you fully assessed the resources and budget you will need for your scheme?
- Are you confident that the objectives of your funding partners will not conflict with your objectives?

2. Setting objectives for your scheme

As well as generating pledges, it is important to be clear about what you want your scheme to achieve. Defining your objectives will:

- Guide the design of the scheme
- Make sure that the right measurement systems are in place
- Build a strong case for the scheme
- Justify ongoing investment

Obviously, the immediate objective of any climate change pledge scheme will be to generate as many pledges as possible. But it is important to remember that this is only a first stage in delivering reduced CO₂ emissions.

In deciding on your objectives it is worth bearing in mind that measuring carbon savings accurately can be difficult and comparatively costly, as it requires that you re-contact a large number of pledgers and collect detailed information on their energy use.

There are other objectives you can set, which may be easier to measure, and which may be more suitable and relevant for your scheme. In addition to generating pledges, you could consider the following:

a. Reinforcing the need for behaviour change to reduce CO₂ emissions

- Raising awareness of climate change
- Educating people on ways to reduce their carbon footprint
- Persuading people that they can make a difference
- Making people feel that they are part of a movement

b. Changing behaviour

- Encouraging behaviour change to save CO₂
- Achieving a CO₂ reduction target in a small community

c. Building a case

- Demonstrating interest in climate change to gain commitment from decision makers and stakeholders

d. Collecting data on individuals

- For use in a future scheme, event or for an ongoing communications programme

However, we would recommend that you avoid setting too many objectives.

Key points to consider:

- Do you have measures in place that match your objectives?

3. Running your scheme

The next step is to think about how your scheme will work in practice. In particular, we would encourage you to consider how the scheme will operate, what web functionality will be required, and what the timeframe will be.

a. Online operations

We recognise that local community pledge schemes often make use of face to face meetings, events and street marketing. This can be very effective in generating interest from people who are not currently interested in carbon reduction, and engaging audiences who do not have access to the internet. However, we recommend that you run the main elements of your pledge scheme online – it will make your scheme more efficient and sustainable because:

- Pledgers can register and enter their contact details themselves
- To measure behaviour change, you will need to find out whether pledgers have kept their commitments. The most efficient way to do this is for pledgers to update the status of their pledges online
- You will need to communicate with pledgers on an ongoing basis. Sending emails rather than letters is more time and cost-efficient, and more environmentally friendly
- Online operations are more scaleable as the same resource is required, regardless of the number of pledgers

Using paper ‘pledge cards’ at events can be an effective way of recruiting people. However, if you do choose to recruit people in this way, we would recommend that you collect email addresses rather than postal addresses for ongoing contact.

b. Site functionality

Certain features are highly recommended:

- Registration functionality:
 - Allows pledgers to return to the site to confirm that they have kept a pledge, or to make new pledges
 - Enables you to track the behaviour of each pledger over time
- Customer database:
 - Enables you to collect pledger contact details
- Opt-ins for further communications:
 - Ensures that you are complying with Data Protection rules
- Automatic email response mechanism:
 - A resource-efficient way to keep in touch
 - Makes sure that you have regular contact with pledgers

c. Time frames

- We would also encourage you to think about the time frame of the scheme. Will the scheme run indefinitely, or do you have a finish date in mind? What do you expect to achieve within this time?
- Setting targets and deadlines has been shown to be a useful way to motivate people and prevent interest levels from waning. Some suggestions are:
 - Setting a target around a particular date, such as Earth Day or Energy Saving Week
 - Asking participants to make pledges to achieve a set target for a school or community

Key points to consider:

- What is the most efficient way to run your scheme, given the resources and web functionality you have available?
- If you have a target or finish date in mind, what do you intend to do with the contact details and pledges you have collected afterwards?
- Collecting names and contact details for future communications **MUST** comply with Data Protection Legislation. Your pledgers must 'opt-in' for online communication. Guidance and wording examples can be found on the Direct Marketing Association website www.dma.org.uk

4. Choosing commitments

As well as getting people to sign up, it is important that you persuade them to keep their pledges in the long-run. This means that setting “do-able” commitments is essential.

Some useful tips are:

a. Be realistic

- Remember who your pledgers are, and what they can actually do and don't ask for too much. For example, children cannot install solar panels, and students probably cannot insulate their lofts - but they can stop leaving the TV on stand-by and turn off lights

b. Keep it simple

- Don't ask pledgers to make too many commitments. If you do, they will struggle to remember them, let alone keep them
- As a starting point, we would recommend asking them to commit to around 5 pledges

c. Be flexible

- People are more likely to keep commitments they have selected themselves, so it is a good idea to provide a choice
- The simplest way to do this is to provide a list of pledges, and allow pledgers to choose as many or as few as they wish
- Remember that you may have both committed environmentalists and green 'novices' among your pledgers, and that you may need to cater for a range of levels. If you have the necessary tools, some suggestions are:
 - Allowing participants to select their own CO₂ reduction targets
 - Providing different pledge 'levels', with each level slightly more challenging than the last
 - Adopting a 'two-tier' scheme, with a suite of simple pledges and a suite of more challenging tasks

d. Make it last

- Maintain a core list of pledges on your site for at least a year. Changing your pledges more frequently might confuse people, and make it less likely that they will keep their commitments
- Additional pledges can be added to the list, but don't remove the original pledges

e. Make sure you can measure it!

- Make sure that all pledges have a proven CO₂ saving, so that pledgers can see how big a difference they have made
- Avoid pledges that could be detrimental. For example, don't ask people to throw away washing machines that still work – only suggest

buying a more energy efficient version if they are already considering buying a new machine

Key points to consider:

- To achieve lasting behaviour change, we would suggest that you focus on achieving long-term commitment
 - Are you being realistic in what you are asking for?
 - Will you be able to help your pledgers keep and increase their CO₂ savings?

5. Making sure you have a 'sticky' site

A 'sticky' website is one that people enjoy using, and return to time and time again.

Keeping your pledgers engaged and interested is vital if you want them to stay committed, so we would advise making their experience of your scheme positive and rewarding, and your site as 'sticky' as possible.

Some suggestions are:

a. Make it easy

- Keep registration simple – ask as few questions as possible
- Let pledgers choose their own username and password
- Make sure your website is easy to navigate

b. Make it fun

- Communicate energy savings in a visual and entertaining way, using graphs and images
- Educate pledgers using games or quizzes
- Feature interesting stories

c. Make it useful

- Feature articles explaining how each pledge will help to reduce CO₂
- Include links to other relevant websites
- Provide tips and tools to help people keep their pledges, for example loft insulation quotes or car sharing networks
- Encourage visitors to swop links and share content – this will also help improve your search rankings.

d. Make it personal

- Send pledgers e-certificates and personal reports
- Provide a CO₂ calculator to allow pledgers to calculate their own savings
- Provide a personalised homepage

e. Celebrate success

- At the very least, thank people for pledging
- Consider posting names of new pledgers on your website. However if you choose to do this, do remember to gain permission from pledgers first, to ensure that you are complying with data protection laws
- Congratulate pledgers on keeping their commitments
- Tell pledgers how much CO₂ they have saved, and what it is equivalent to, for example ten car journeys between London and Manchester
- Post success stories and 'pledgers of the month' on your website

f. Create a team spirit

- Creating an online community generates a powerful sense of team spirit, and allows people to share ideas and motivate each other. This can also be done via a social networking site.
- Giving schemes a local focus is also effective. Consider adding regional pages to your website, providing updates on local events and illustrating how many people are signed up in each region
- Other suggestions are:
 - Posting the rolling total number of pledges, or carbon savings to date on your site
 - Encouraging members to upload their own content, for example children's drawings
 - Hosting blogs

Key points to consider:

- Why should people come back to your site? How can you keep it topical and engaging? The more enjoyable the experience, the more likely pledgers are to keep their commitments

6. Keeping in touch

It is a good idea to build an ongoing communication plan into your scheme. Communicating with pledgers over time prevents interest from waning, and makes it more likely that pledges will be kept.

Some opportunities for communication are:

a. Reminding people about their pledges

- At a minimum we would advise prompting pledgers a few weeks or months after commitment to remind them of their pledge
- If possible, find out how they have done. Send a message of congratulations if they have kept the pledge, and encourage them to 're-pledge' if they have not

b. Encouraging greater commitment

- Contact successful pledgers after a few months to prompt them to take up new commitments
- Send personalised suggestions and targets based on the pledging data you hold on them
- Encourage them to become ambassadors for the scheme:
 - Via promotions, for example 'sign up 10 pledges and join our online hall of fame'
 - Via a 'recruit a friend' button on the website
 - For local schemes, provide downloadable posters for pledgers to use in their windows

c. Keeping people informed

- Send monthly or quarterly downloadable 'e-newsletters', or emails providing updates on the scheme. Potential content could include CO₂ saved to date, new initiatives, success stories, and articles on particular issues
- Direct pledgers back to your website by sending emails informing them of new content

d. Helping people to keep their pledges

- Tailor the information you send as much as possible. If you offer a range of pledges, send information and advice that relates to the pledge a participant has selected

Key points to consider:

- Ongoing communication is key to encouraging people to actually put their pledges into action
- Recruitment is expensive. Once you have engaged people and collected their data, maximise the benefit by encouraging further commitment

7. Promoting the scheme

Once your scheme is set up, think about how you will spread the word to potential prospects and encourage them to register. Write a simple strategy that starts with your objectives and your target audience and then ensures that your promotional activities are chosen to fulfil those objectives.

Before you start to publicise your scheme, remember the following:

- A memorable, colourful logo should be used consistently in all communications
- Use positive language and focus on encouragement rather than restriction
- Ultimately the aim is to drive potential pledgers online, so always include the web address in any promotional activity

The first communication routes we would suggest are:

a. Make the most of existing resources

- First and foremost, consider which existing communication resources you have at your disposal. These could be websites, magazines, posters, and physical centres

b. Recruit advocates and ambassadors

- Use partner organisations, schools, local businesses, suppliers, clubs, staff, neighbours and existing pledgers to spread the word and recruit others

c. Get larger schemes to help

- Use other schemes with aligned interests to promote your scheme by adding your logo to their communication materials, or a link from their website

d. Get free press, television and radio coverage

- Have a launch 'event', invite journalists and provide a simple 'press pack' with details of your scheme and why you are launching it.
- Talk to journalists and look for 'hooks' to make interesting stories

Other recruitment methods can be effective but need to be handled with caution as they are more costly:

a. Online advertising

- This is only an option for large, national schemes
- Take care to place advertisements on relevant sites, and include simple, straightforward calls to action
- The most efficient way to promote your scheme online may be Search Engine Marketing. Using this will mean that anyone looking for 'pledge schemes' using a search engine such as Google will find your website more quickly .

b. Face-to-face contact

- Face-to-face contact is very effective at engaging people, and consequently events can recruit a high number of pledgers. But remember that processing paper pledges is more resource-intensive than online registration
- An alternative is to provide laptops at events, so that contact details can be entered on the spot

c. Incentives

- Incentives are 'freebies' such as re-usable shopping bags or energy efficient light bulbs, or entry into a prize draw
- Providing incentives is likely to increase the number of pledgers, but:
 - It is an additional cost
 - It may be difficult to estimate response and you may run out of incentives or have some left over
 - Unless the incentive can be provided via email, packs will have to be put together by hand. This is both time consuming and expensive
 - It may elicit responses from people who are only interested in the 'freebie' rather than ongoing commitment, and may consequently distort any measures of success
- If you do choose to use incentives, we would advise you to follow these guidelines:
 - Avoid instant gratification. Only provide prizes or rewards once people have completed a number of pledges
 - Encourage people to allocate pledges to an organisation or community, for example a school, so that the organisation receives the incentive, rather than individual pledgers
 - Enter people in competitions rather than providing everyone with a freebie so that you can control the amount of incentives required

Key points to consider:

- Make the most of all free and cost-effective promotion opportunities
- If your objective is behaviour change, ensure that any incentives offered will reinforce this
- Prize draws, competitions etc. must comply with regulations on gambling and competitions. Information is available from the Institute of Sales Promotion www.isp.org.uk

8. Measuring success

Measuring the success of your scheme is important for a number of reasons:

- It makes people feel proud of the success of the scheme
- It helps you to identify any necessary changes
- It helps you to develop ways to evolve and grow the scheme
- It justifies the investment you have made, and establishes the case for further expenditure in the scheme.

Website measures provide the minimum level of quantified measurement that should be implemented to evaluate your scheme, these include:

- a. Number of visits and visitors to your site**
- b. Number of people who register**
- c. Number of people who provide their contact details and 'opt-in' for further contact**
- d. Number and type of pledges made**
- e. Number of people who return**
- f. Average amount of time spent on the site**
- g. Average number of pages visited on the site**
- h. Type of pages visited**

These measures will enable you to assess the volume and level of interest in your pledge scheme.

If you run a programme of ongoing communications, you will also be able to collect information on:

- a. How many pledges have been kept**
- b. Which pledges have been kept**
- c. How many new pledges have been adopted**

This will allow you to make a more accurate assessment of the CO₂ savings your scheme is achieving over time.

However, most schemes have other objectives too (see 2. Setting Objectives). Whatever objectives you set for your scheme, we would encourage you to choose the right technique to measure it. Investing in robust and quantified measurement is very important if your scheme is to justify the investment and work you are putting into it.

The table on the following pages outlines some appropriate measures for specific scheme objectives, and highlights the advantages and limitations of using these measures.

Key points to consider:

- Ensure that measurement is proportional to the scheme - don't spend a fortune on research if you only spent a small amount on the scheme, unless it is a pilot or test which you plan to rollout to a wider audience
- We would encourage you to establish effectiveness measures that directly relate to the objectives for the scheme

Examples of Measures For Each Objective:

Objective	Measure	Limitations	Advantages
1. Reinforcing the need to change by increasing awareness and changing attitudes	<ul style="list-style-type: none"> Online survey of people visiting website and/or pledgers 	<ul style="list-style-type: none"> May not get a high response rate, particularly if it is a long questionnaire May not be representative of everyone who visited or pledged 	<ul style="list-style-type: none"> Provides quantifiable data Can be replicated over time and at further stages so you can see how attitudes have changed
2. Changing behaviour	<ul style="list-style-type: none"> Number of pledges and types of pledges made Number of people pledging Corresponding reduction in CO₂ consumption in either absolute or percentage terms 	<ul style="list-style-type: none"> How to prove pledge completion? Possible double counting if pledgers join more than one scheme People tend to tick things they are already doing – not new pledges You may not know if the pledge is sustained in the long term Results from a small scale (e.g. local) test may not be replicable on a larger scale (e.g. national) 	<ul style="list-style-type: none"> Measures the end objective of behaviour change and subsequent CO₂ reduction
3. Building a case	<ul style="list-style-type: none"> Number of people pledging Number of pledges made and completed Number of hits to your website Time spent on your website 	The same limitations as 2. above.	<ul style="list-style-type: none"> Quantified measures with associated costs can deliver a robust business case and provide evidence to lobby decision makers and stakeholders.

	<ul style="list-style-type: none"> • Number of webpages visited • Cost per pledger / pledge • Set-up and ongoing costs 		
4. Collecting data on individuals	<ul style="list-style-type: none"> • Number of pledgers or registered users • Amount of data collected • Number of opt-ins to further communication from you 	<ul style="list-style-type: none"> • Will require certain key questions to be asked at registration (age, sex, postcode) • It is important to continue communicating with registered pledgers over time – requiring ongoing resources • If they choose not to opt in you cannot re-contact them 	<ul style="list-style-type: none"> • Post-code profiling to give you information on your pledgers • Knowing who is more likely to pledge means that you know who to target in your communications. • Allows re-contact to encourage further activity - and further behaviour change. (But remember that, in order to comply with Data Protection Legislation, they must have opted-in to receive further communication).

Appendix

i. Interview and Workshop Participants

Interviewee	Organisation / Pledge Scheme
Jessica Aldred	The Guardian / Tread Lightly
Sam Balch	Climate Change Champions
Natascha Bowett,	Birmingham Cutting CO ₂
Simon Breakell	Eon / Carbon Footyprint
Keith Budden	Birmingham Cutting CO ₂
Ian Byrne	National Energy Foundation
Gary Charnock	Ashton Hayes
Gina Cooke	Marlborough Climate Pledge
Beck Dawson	Marlborough Climate Pledge
Simon Gerrard	CRed / University of East Anglia
Peter Gudde	CRed Suffolk
Jon McGowan	Energy Saving Trust
Matthew Ling	Ipswich Borough Council
May McKeith	Manchester is My Planet
Jessie Marcham	Everybody's Talking About Climate Change, Derbyshire County Council
Tamara Mauro-Trujillo	Energy Savings Trust
Christine Mills	Birmingham Cutting CO ₂
Rinku Mitra	Your Climate Your Life
Charlie Morris- Marsham	Oxford is My World

Ciaran Mundy	Low Fly Zone
Michelle O’Riordan	Travel Awareness Team, Lambeth Borough Council
Lucy Pearce	I Count
Jo Pike	imovelondon
Matt Prescott	RSA Carbon Limited
Simon Robinson	Manchester is My Planet
Chris Shearlock	The Co-operative Group / Climate Challenge Pledge
Lisa Talbot	Gosport Borough Council / Carbon Pledge Project

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