

# FROM THEORY TO PRACTICE

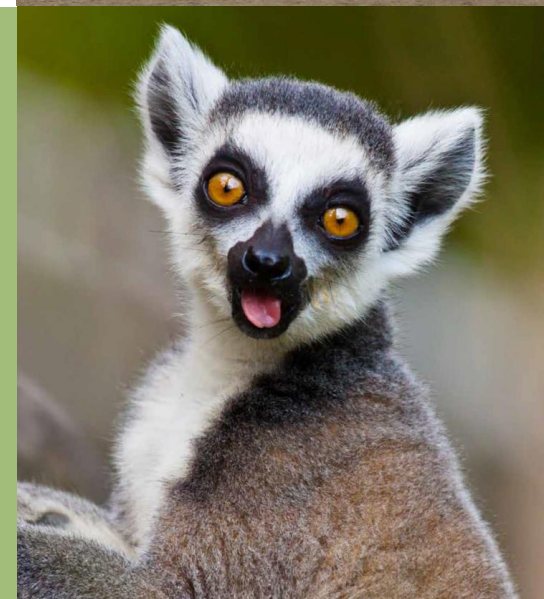
## The CARE Conservation Engagement Roadmap



EMILY ROUTMAN  
ASSOCIATES

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SAN DIEGO ZOO  
GLOBAL



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## INTRODUCTION

With audiences numbering in the hundreds of millions globally, accredited zoos and aquariums have the potential to be a significant force for meaningful change in the public's conservation attitudes and behavior. *From Theory to Practice: The CARE Conservation Engagement Roadmap* provides a structure for outlining how the different elements of a program or exhibit—from awe-inspiring animal experiences to conservation action opportunities—work together to move our audiences toward meaningful, mission-advancing change. It is a companion to *From Caring to Action: A Unifying Framework for Audience Conservation Engagement*. Together they describe how to combine environmental education approaches with social marketing techniques to cultivate an environmental ethic and empower our audiences to take action.

The Roadmap is a guide for applying the principles of the Framework to practice. It includes a worksheet to use as a template for planning conservation engagement efforts, from individual programs to organization-wide initiatives.

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# PART 1: A ROADMAP FOR CONSERVATION ENGAGEMENT

## Principles and Practices

The Roadmap and its precursor, the Framework, are based on a fundamental principle of behavioral psychology: what people choose to do or not do is the result of the interplay of factors that either promote a behavior or oppose it. **To move people to action, change the balance: promote the behavior you want (*motivate* them), and reduce factors that oppose it (*facilitate* action).** The key is to understand how the ways we engage our audiences can increase motivation to act or facilitate action, and to strategize accordingly.

The CARE acronym stands for the four core elements of the Roadmap and Framework, each one a key component of effective conservation engagement strategies.

### Cultivate Caring

Memorable animal experiences *motivate* our visitors by increasing feelings of caring and connection, and educational elements add to that motivation by expanding our audiences' understanding of the natural world and our relationship to it. These environmental education-based tools can be effective at building the values and beliefs that underly an environmental ethic, with potential long-term conservation benefits. They are not, however, sufficient to move people to take immediate action to solve conservation problems.

### Amplify Intent

We can further *motivate* our audiences with social marketing-based techniques that tap into basic human nature. These include: promoting very specific actions; using positive, encouraging messaging; framing desired actions as the social norm; getting people to make public commitments; providing recognition; and offering cause-related incentives.

### Remove Barriers

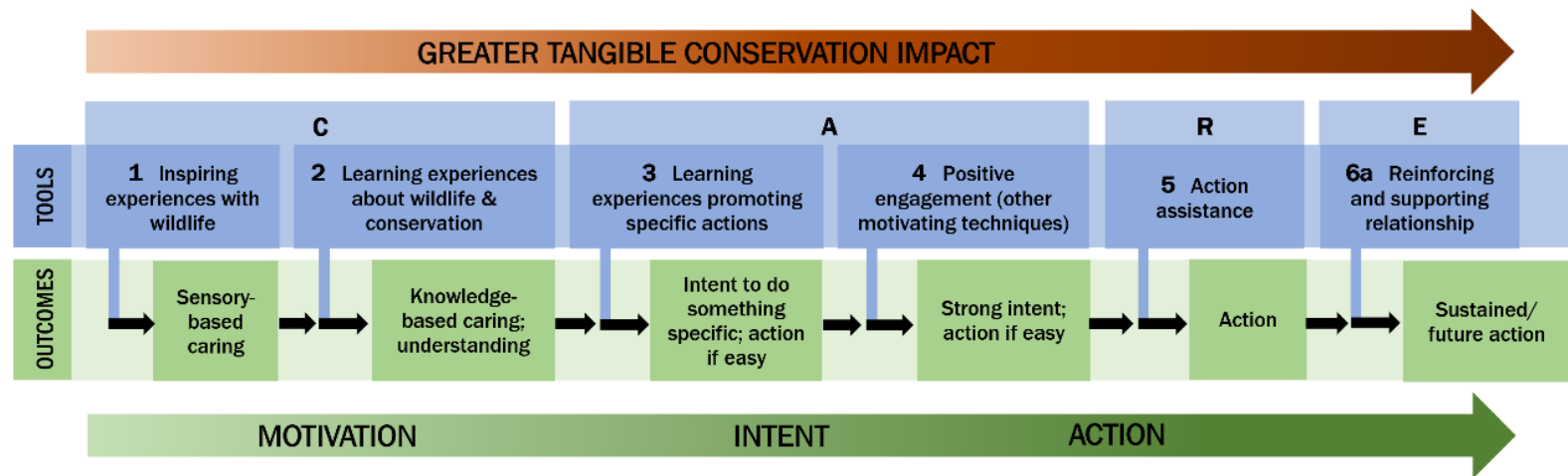
The key to success in translating intent into behavior is to *facilitate* action. Make it easy—and at the same time, build the audience's confidence that they can do it and that it will make a difference. No amount of motivation or encouragement will move our guests to do something if it is too difficult or inconvenient—or if they think it will be. Find out what might stand in the way of someone taking a specific action, and take steps to remove those barriers.

### Expand Impact

Expand the conservation value of engaging audiences by aiming beyond one person, one action, one time. Extend impact over time by remaining connected with the audience beyond the visit; elevate impact by leveraging the audience's voice to influence policy, business, or industry; and scale up by multiplying the audience—engaging communities such as schools, business, or cities, or working with partner institutions in order to reach a greater number of people and increase collective impact.

The Roadmap recognizes six discrete tools within the four CARE strategies. The tools are numbered in order of type of conservation impact, from most diffuse to most direct. Those at the beginning of the list are primarily investments in positive attitudes and beliefs about wildlife and conservation. Each successive tool brings an increased chance of tangible conservation benefits (Figure 1).

<b>Cultivate Caring</b>	<ol style="list-style-type: none"> <li>Inspiring animal experiences</li> <li>Memorable learning experiences about wildlife and conservation</li> </ol>
<b>Amplify Intent</b>	<ol style="list-style-type: none"> <li>Learning experiences focusing on specific actions, using social marketing-informed messaging techniques</li> <li>Active, positive engagement using social marketing techniques that heighten enthusiasm and commitment</li> </ol>
<b>Remove Barriers</b>	<ol style="list-style-type: none"> <li>Action assistance: identify and remove barriers</li> </ol>
<b>Expand Impact</b>	<ol style="list-style-type: none"> <li>Boost conservation value: extend the connection beyond the visit; leverage audience actions for higher-level change; increase the audience through partnerships</li> </ol>



**FIGURE 1** Relationships between the CARE engagement tools and conservation-related audience outcomes

With an understanding of what each tool can contribute to audience outcomes, you can create a plan for how to combine them in order to reach your goals. Tools 1 and 2, environmental education-based practices, cultivate caring and understanding, building an intrinsic motivation to protect wildlife and the environment. Tools 3 and 4, drawn from social marketing, tap into less rational aspects of human nature to bump up interest and enthusiasm, increasing the chances of

sparking action. Tool 5, also from social marketing, represents one of the most important techniques for increasing success in moving people to action, which is to identify and remove barriers to action. Tool 6 is a strategy for increasing tangible conservation benefits beyond the effects on individuals in the moment. (For details of approaches to boosting motivation and facilitating action, see Table 1 of the Framework, included in this document as Appendix 1.)

While the logic of the sequence is based on whether the impact is diffuse or direct, the order of the tools also reflects a historical trend in zoo and aquarium approaches to conservation engagement. At the beginning of the list are our traditional methods for inspiring conservation. As we have developed a better understanding of how to promote sustainable behavior, we've begun to integrate additional techniques, moving farther along the spectrum. **Tools at the action end of the spectrum represent emerging practices, and integration of these techniques is a focus of current efforts to increase the efficacy of zoos and aquariums as agents of conservation change.**

### Strategic Use of Tools

Within a particular program or exhibition, the combination of elements that make up the guest experience represents a strategy for achieving that program's goals and objectives. Each element, or tool, has a specific role to play (see next section: *A Closer Look at the Tools*). Where the priority is to move the needle on attitudes and knowledge, the emphasis will be on tools at the beginning of the spectrum, and where direct conservation action is targeted—using guest engagement to address urgent conservation challenges—tools toward the action end of the spectrum come into play. The tools also can be looked at as elements of an organization-wide strategy for achieving a conservation goal. Monterey Bay Aquarium's *Seafood Watch* campaign, for example, integrates the entire range of tools across the organization's audience experiences, from exhibits and programs to the restaurants and the website, to promote sustainable seafood.

Most initiatives will not use all of the tools, and guests won't necessarily experience the tools in order. A children's zoo contact yard may use only animal experiences and learning elements that reinforce positive feelings, Tools 1 and 2. Programs that involve families in restoring habitat may start with Tool 5, and the selection of other tools integrated into the program will depend on the program's conservation goals. A campaign that promotes off-site actions such as recycling fishing line may not involve animal experiences, but instead may begin with Tool 3 and emphasize Tools 4 and 5.

Engagement efforts that target action often require coordination across divisions. The expertise for delivering excellence in the various categories of tools won't reside in one individual, or one department, or in some cases even one organization. And action campaigns can be complicated and labor-intensive—especially those promoting actions that take place post-visit or entirely off-site. In order to focus resources, and also to avoid overwhelming guests, a zoo or aquarium should limit the number of action campaigns going on at a given time. The exception is for enjoyable one-time actions that can be completed during a visit or program: so long as they are an entirely positive part of the guest experience, there's no reason to limit them. (*For more on action campaigns see Appendix 2.*)



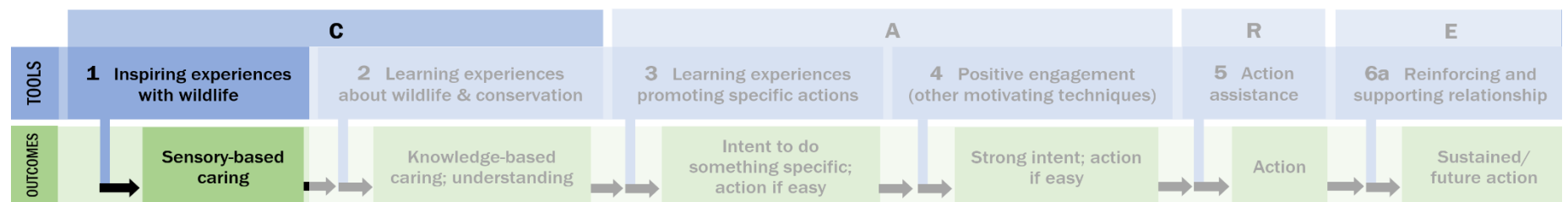
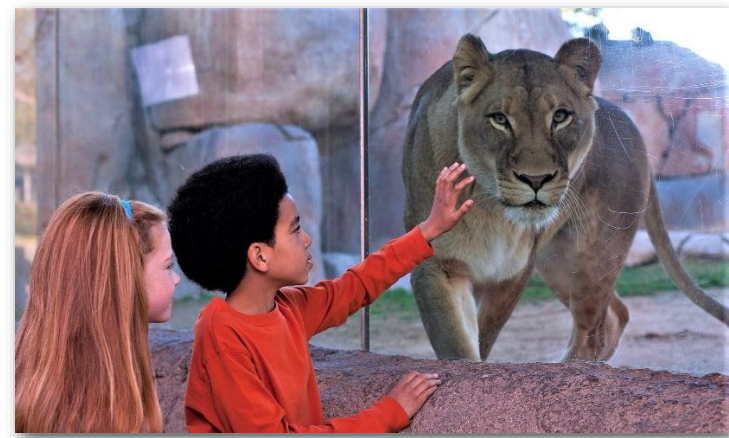
## A Closer Look at the Tools

### Tool 1: Inspiring wildlife experiences (*motivate*)

Animal experiences are our bread and butter, our key differentiator as conservation organizations. They are also at the core of our relationship with our audiences, who value us above all as places to find unique opportunities to connect with the natural world and enjoy wildlife-focused learning and recreational experiences. Our animal (and plant) ambassadors open guests' minds to the wonders of nature, awakening appreciation for other living things as essential and treasured parts of our world.

Although our wildlife encounters don't take place in a void, it is helpful to look at them as separate and distinct elements of the guest experience in order to clearly consider what they contribute to outcomes. Even without words, the sensory input from seeing, hearing, smelling, or touching animals has an impact. What does a child take away from gazing eye-to-eye at a lion, separated only by a pane of glass? How does overcoming nerves to touch a snake, or seeing giraffes, antelope and long-legged birds roaming a vast landscape stir guests? These special moments can spark emotions such as awe or excitement, and in the process cement lasting memories, increase feelings of connection, caring, and empathy, and heighten interest in learning and in taking action. They also convey information: familiarity with a species' physical characteristics and behavior, a sense of the organization's ethic about quality of care, and an impression of an animal as existing within a particular habitat or ecosystem.

By capturing guests' attention and activating interest, animal experiences also significantly boost the effectiveness of other learning elements. There is a measurable difference in what guests learn and remember from seeing, for example, graphics or video alone versus viewing those same elements while graceful sharks cruise past or a gorilla watches from inches away, or hearing someone talk about animals vs. hearing about animals that are leaping, swimming, or playing in front of their eyes.



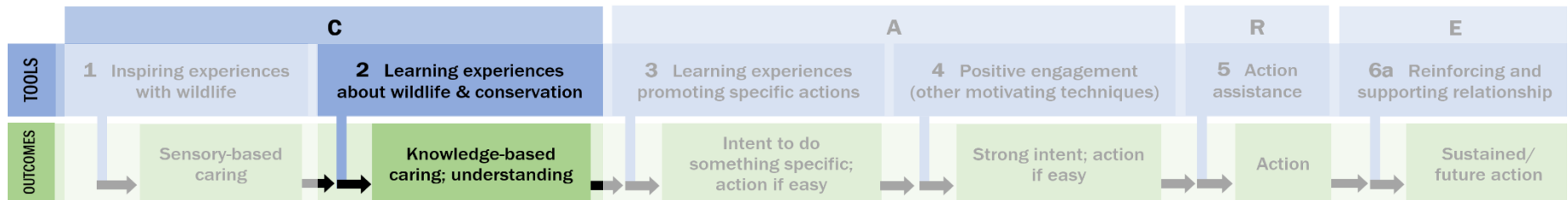
## Tool 2: Learning experiences about wildlife and conservation (motivate)

Stories, concepts and information about wildlife and conservation can be delivered in an endless variety of formats, from the narration for animal programs to graphics, videos, live interpreters, social media, and more. While educational elements are especially powerful when tied to animal experiences, they may occur independently, for example when a guest stops at an interpreter station, accesses social media feed, or visits the website.

Most educational messaging in zoos and aquariums is geared toward fostering an understanding of wildlife and how the natural world works. Educational elements may also raise awareness of conservation issues and promote a sense that conservation is personally relevant. These experiences help build the values and beliefs that are the foundation of an environmental ethic. Without reinforcement or facilitation they aren't sufficient to move people to action, but they build preparedness for action—a predisposition to help when the circumstances are right.

To achieve defined objectives, learning experiences must be designed for the audience and the setting, which means applying best practices in interpretive design and communication. They have to be appealing enough to attract and hold attention, easily understood by the general public, memorable, and relatable. Active experiences—touching something, manipulating a device, role-playing—are more effective than passive. Messaging relating directly to animal experiences and/or delivered in live presentations or personal interactions is particularly likely to be enjoyed and remembered. And as challenging as it can be, positive framing is essential when communicating about

conservation issues. Focus on what the organization is doing, what others are doing, what guests can do, and what you can achieve together. Messaging that triggers despair is not motivating; instead, it is more likely to cause a defensive dulling of emotional responses and interest.





### Tool 3: Learning experiences promoting specific actions (*facilitate*)

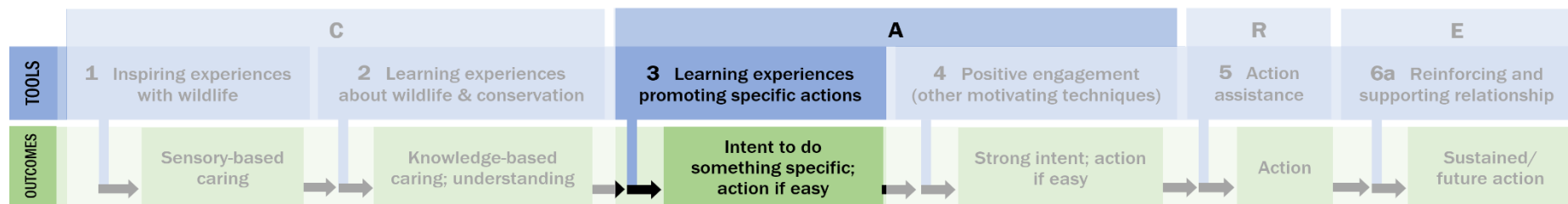
To move audiences to take action, social marketing provides the tools for success. One of the first principles of persuasive action messaging is to concentrate on doing something very specific. Promoting a switch to recycled toilet paper is more effective than just encouraging guests to use recycled paper in general. Too many choices, or guidance that is too general, causes *decision overwhelm*, resulting in uncertainty and inaction. Select a specific action to promote and clearly describe how it alleviates threats to wildlife. Describing benefits in terms of helping an appealing ambassador species (see Tools 1 and 2) makes the case for taking action much more compelling: helping sea turtles has a stronger emotional pull than reducing plastics in the ocean. And reinforce the highest priority action messages in multiple places and through a variety of means. (See *Appendix 2: Selecting Actions to Promote.*)

Whether used alone or in combination with other tools, characteristics of effective action appeals include:

- The focus is on positive actions, not behaviors to avoid.
- Actions are ones that the target audience can easily do (which may involve help from the organization – see Tool 5).
- Actions are presented in a way that is easy to remember (e.g., not just “use recycled toilet paper” but “Wipe for Wildlife,” as Zoos Victoria advises).
- Actions are presented as the social norm. “More and more people are switching to recycled toilet paper, and that helps forest wildlife” is more motivating than “Most people use toilet paper made from pristine forests, and that’s creating a crisis.”

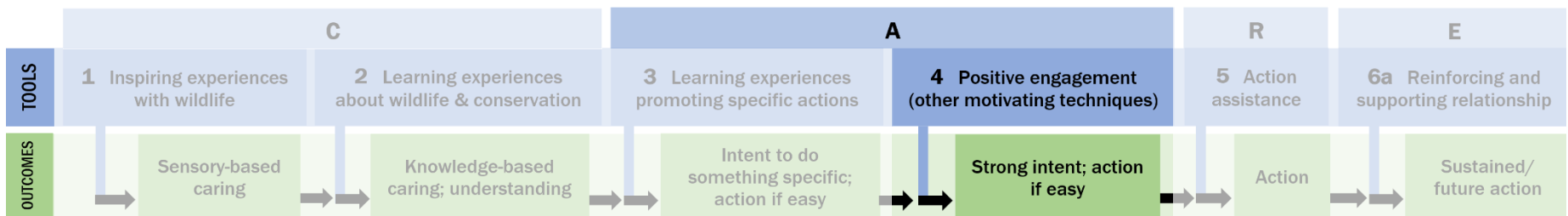
- Messaging builds a sense of self-efficacy, instilling confidence that an action is doable and that it will make a difference.
- Messaging maintains a positive tone, offering encouragement and appreciation rather than provoking fear and guilt.

Action messaging can raise awareness of specific ways to help, and if the action is easy enough, a portion of the most environmentally minded audience will follow through. But even the most well-crafted messaging, in isolation, has limited effectiveness at moving people to action, so action campaigns usually incorporate additional CARE Tools to motivate visitors and facilitate action.



## Tool 4: Positive engagement (*motivate*)

All of the tools described so far build motivation to protect wildlife based on an interest in doing good. One of the approaches that social marketing brings into the picture is to use techniques that tap into basic human nature—our social instincts and enjoyment of rewards—rather than relying on caring and knowledge alone. Because we are social, we take pleasure in positive feedback and recognition. We want to act in a way that’s consistent with how we see ourselves and how other see us, so when we make a public commitment, we are inclined to follow through on it. And we get excited when we earn rewards: a wristband received in exchange for a small donation feels like a little treasure and a source of pride. Techniques that bump up enthusiasm and follow-through by appealing to these fundamental human traits include durable public pledges, recognition and acknowledgement, immediate positive feedback, and cause-related incentives. Barriers will still stop some from taking action (see Tool 5), but if the action isn’t difficult, you can expect measurable success.

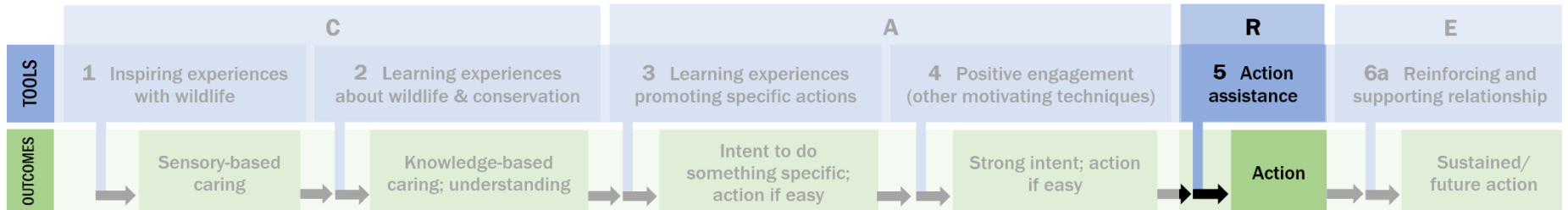


## Tool 5: Action assistance (*facilitate*)

The most significant factor affecting whether someone will act on intent to do something is how easy it is. That brings us to an essential next step, which is to address the challenges that might prevent a person from taking action. The solutions are as diverse as the barriers. It could mean providing an opportunity on-site. Rather than asking guests to contact their legislator when they get home, offer a card to fill out while they're there, or set up a web-linked kiosk. Helping them take a first step during their visit can make a big difference. For example, San Antonio Zoo volunteers help guests register online for citizen science programs. If remembering is a challenge, provide prompts, such as a window sticker with a reminder to put re-usable grocery bags in the car. You can turn labor-intensive outdoor projects that otherwise would be drudgery into enjoyable family outings by offering fun habitat clean-up programs and tree-planting parties. Sometimes the barrier is lack of information. Zoos Victoria's research revealed that the biggest barrier to cat owners transitioning to keeping cats indoors was lack of confidence that they could keep their cats happy, so the Zoo offers a wealth of how-to tips and videos on their *Safe Cat, Safe Wildlife* website. Often the barriers are practical, as when recommended products are hard to find. For their *Planting for Pollinators* campaign, Cincinnati Zoo and Botanical Garden (CZBG) works with growers and nurseries to make sure suitable pollinator-friendly plants are available locally and lists sources on their website.

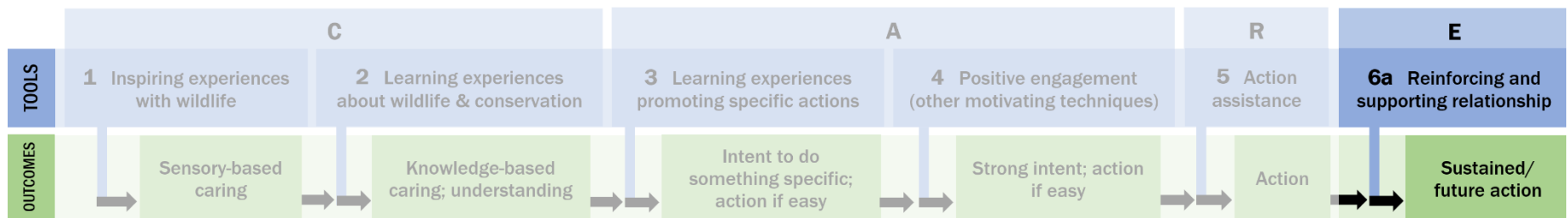
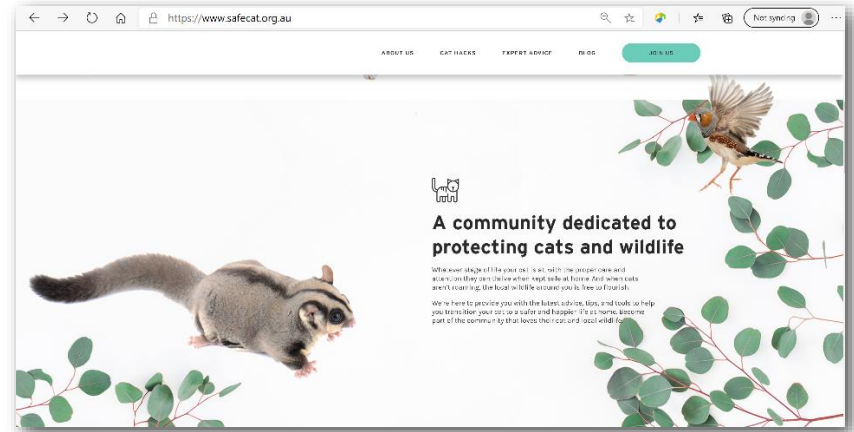
Even lack of confidence that an action can make a difference can be a barrier, which is why positive messaging (see Tool 3) is essential. Part of planning a campaign is to conduct research with the target audience to identify the barriers, which may not be obvious, and to

come up with successful strategies to overcome them. This type of social science research is one of the important new proficiencies zoos and aquariums will need to bring into play in order to become effective at mobilizing a motivated audience as a force for conservation.



## Tool 6a: Reinforcing and supporting relationships (motivate and facilitate)

There are three ways to expand the conservation value of engaging your audiences. The first, Tool 6a, is to extend the connection with guests beyond the visit or program. With that relationship in place, you can continue to motivate and facilitate action, using any of the other tools of engagement that apply to the circumstances. Few things motivate a person to stick to a commitment more than someone they know and trust reminding them to do so and showing appreciation for their efforts, and that post-visit connection can be a conduit for positive feedback and rewards. You can offer useful information, encouraging news, opportunities to sign up for additional projects, links that participants can share to engage friends and family, or images that can be shared on social media. CBZG, for example, sends *Family Community Service* participants a follow-up thank-you note and a summary of what they accomplished, gives regular updates on the cumulative impact of projects and offers invitations to future activities. Zoo's Victoria's *Safe Cats, Safe Wildlife* website, in addition to offering helpful information and updates, provides a place for cat owners to share their own stories and tips and ask questions, creating a sense of community and shared purpose.



## Tool 6b: Beyond individual action

While Tool 6a lies at the end of the spectrum of individual engagement techniques, it is only one of three ways to *expand impact*. Tool 6b includes two additional strategies that maximize conservation value by going beyond what can be accomplished through individual action alone. The second is to elevate impact by using your visitors' actions and voices to create change at higher levels, such as industry and policy. *Seafood Watch* doesn't just equip visitors to make ocean-friendly choices; in doing so it drives the market for sustainable seafood, making it possible for Monterey Bay Aquarium to influence restaurants, seafood providers, fisheries and aquaculture. The Wildlife Conservation Society's *96 Elephants* campaign gathered hundreds of thousands of public comments in support of a ban on commercial sales of ivory and leveraged them to successfully advocate for enactment of federal legislation in 2016.



The third way to expand impact is to scale up: maximize the number of people reached by working with communities instead of (or in addition to) individuals and by empowering partner institutions to reach out to their audiences. Chester Zoo brought together businesses, food suppliers, schools and government officials in a campaign that moved Chester to become the world's first Sustainable Palm Oil City, with the city's university and more than 50 organizations committing to using only sustainably-sourced palm oil. For the *Gorillas on the Line* campaign, the *Gorilla SAFE* collaborative of the AZA set up the recycling logistics and provided promotional content and designs to 21 partner zoos, resulting in the recycling of 12,486 cellphones in 2019, its first year. Over 40 zoos signed up for 2020, and the number of partners for future campaigns is growing rapidly.

The benefits of expanding your reach don't apply only to initiatives aimed at moving audiences to action. At the other end of the impact spectrum, the *Fostering Empathy for Animals* workshop developed by Seattle Aquarium has, as of this writing, trained close to 60 institutions in how to cultivate empathy, an emotional connection that has been shown to increase motivation to protect wildlife.



## Engagement Pathways

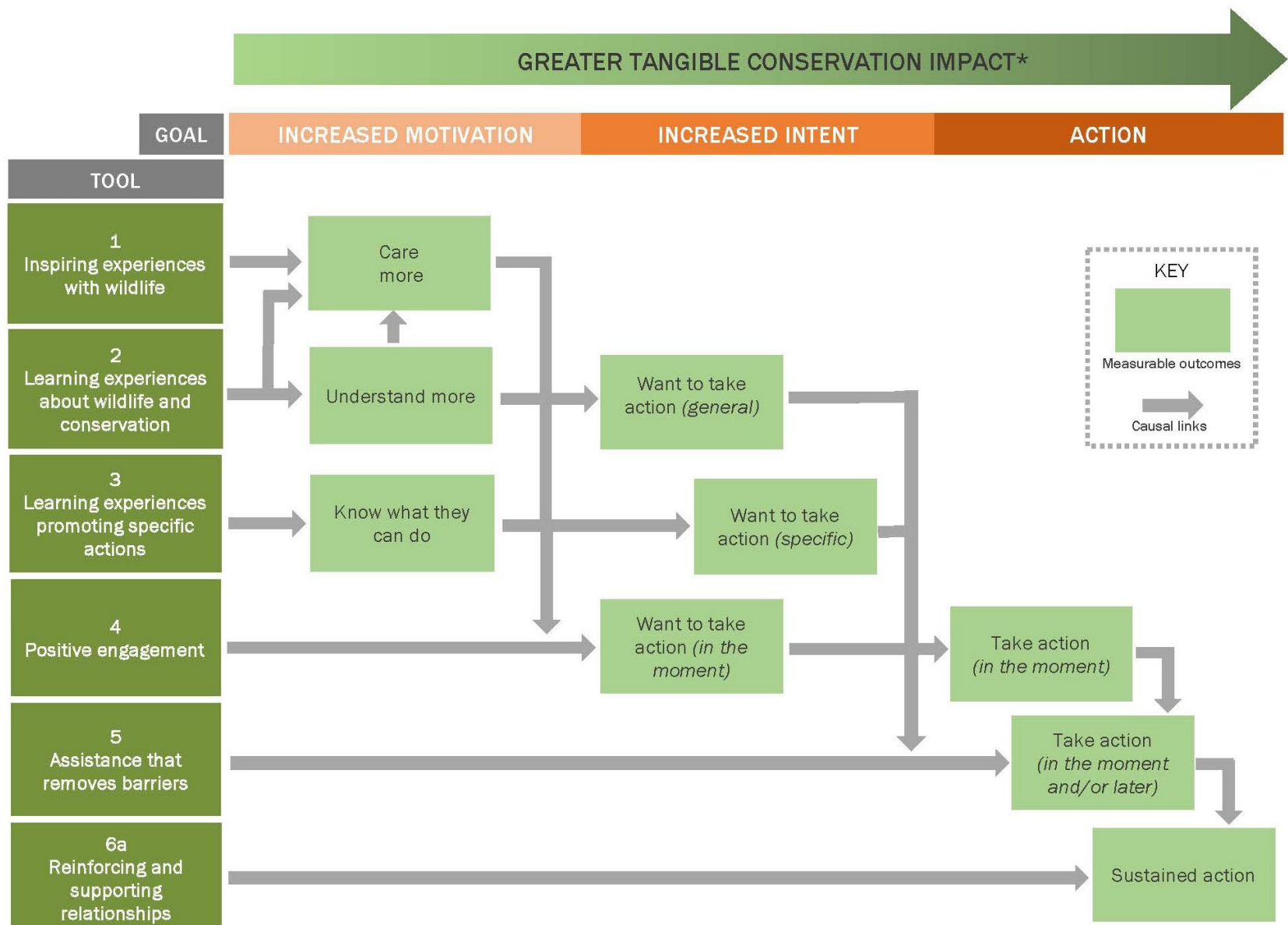
The diagram on the following page (Figure 2) shows an expanded view of the relationships among tools and outcomes. With the tools and outcomes on different axes, it is easier to see that there are a variety of possible pathways to the same goals. Audiences will start at a range of different points along the pathway, and the tools incorporated into programs will vary, even for programs that target the same outcomes.

Within a program or exhibition, the combination of tools included in the guest experience—the pathway—represents a strategy for achieving that program’s conservation engagement objectives. The pathway also can be used to represent a plan for a broader conservation initiative, spanning multiple guest experiences.

Each row in the flowchart shows the progress that can be promoted with the tool anchoring that row. Outcomes in lower rows generally depend on conditions described by outcomes in rows above them being true. For example, *positive engagement* is most likely to result in action when someone cares about the issue and has a clear idea about what they can do to help. Those prerequisite conditions or outcomes may result from experiences that are part of that program, from other programs, or from previous visits, or be something guests bring with them. Guests with a higher-than-average environmental ethic come to us with caring and understanding already in place. For them, starting with Tool 3 or 4 can be an effective strategy. Similarly, no matter the starting point, the pathway does not have to go through all of the tools.

### Tools and Outcomes in Brief

- 1.** Inspiring sensory experiences with wildlife such as eye-to-eye viewing and seeing animals in action can spark feelings of awe, empathy, appreciation or connectedness.
- 2.** Learning experiences that increase appreciation for wildlife and nature, awareness of issues, and the sense that conservation is personally relevant cultivate values and beliefs that are the foundation of an environmental ethic.
- 3.** Learning experiences promoting specific actions build understanding of what one can do and how each action helps alleviate a problem, and increase confidence that an individual can make a difference, contributing to an intent to take action.
- 4.** Techniques of active engagement such as public pledges, recognition and rewards move people one step closer to action and may lead them to take advantage of an opportunity to do something during a visit, such as sign a petition or make a small donation, or complete easy actions after a visit.
- 5.** To move people to take action post-visit that is more involved address practical barriers, for example by ensuring the availability of sustainable products, providing tools (e.g. web resources, apps, or links to email legislators), or offering training in programs.
- 6.** To increase conservation value, extend the relationship with follow-up correspondence, e.g., messages of appreciation, updates on cumulative impact and invitations to future events; elevate impact by leveraging visitor actions for change at higher levels such as industry or policy; and reach a larger audience by engaging communities and empowering partner institutions.



**FIGURE 2**  
Pathways toward conservation change.

\* A complementary enhancement strategy (Tool 6b) can further increase benefits: leverage audience action for change at higher levels; expand audience by working with communities or empowering partner institutions

# PART 2: THE CONSERVATION ENGAGEMENT WORKSHEET

## A Planning Template

The CARE Conservation Engagement Worksheet, provided in Appendix 1, is a template for using the Roadmap to strategize and communicate how parts of a program contribute to specific conservation-related outcomes. The form is also available as a separate, fillable Word document. A completed worksheet outlines a plan for achieving a program’s conservation engagement goals. It’s a simple format for documenting an exhibit, program or initiative’s separate elements and intended outcomes: how each will affect the audiences’ knowledge, feelings and actions, and if relevant, how those results will be scaled up for greater conservation impact.

The worksheet is designed to be flexible—how you use it depends on your need. You can use it to plan a new program, exhibit, or broader initiative, or to analyze an existing one. The simplest case is to use it to describe or plan one program with one goal and one primary audience, but it also can be applied to a program targeting different outcomes for different audiences, or multiple programs feeding into a single conservation goal.

The worksheet is effectively a checklist with a built-in analytical function that ensures that ideas are considered in relation to defined goals: *If we do these things, are we likely to achieve our intended goals? Are there things we haven’t considered that might increase our success?* In addition to lending clarity to the thought process, it can aid collaboration. Some initiatives, especially ones that target action to address a conservation issue, may span multiple departments or even several partner institutions. Working from a shared template can streamline the collaborative process by helping partners delineate responsibilities, communicate clearly, and discuss ideas from a common perspective.

**CARE Conservation Engagement Worksheet**

Program (program, exhibit or initiative):  
 Purpose (primary conservation engagement goals):  
 People (primary target audience):

	Tools	Program Elements	Target Outcomes
MOTIVATE	<b>1: Inspiring wildlife experiences</b> Physical/sensory experiences with wildlife to foster connectedness, affection, empathy; emotion-based appreciation Examples: Eye-to-eye viewing, animals in action; animals interacting with each other or their environment.		
MOTIVATE	<b>2: Learning experiences that build values and beliefs about wildlife and conservation</b> Communication elements that contribute to cognitive appreciation for animal; spark awe or empathy; increase understanding of the natural world and our relationship to it; raise awareness of conservation issues and their personal relevance; describe the organization’s conservation role Examples: Program narration such as keeper talk or animal show; graphics; video; multimedia interactives; staffed interpretive station; social media; website		
FACILITATE	<b>3: Learning experiences promoting specific actions</b> Communication elements that describe specifically what to do and how; cultivate a sense of competence and impact; create a positive outlook; convey positive social norm Examples: Program narration; graphics; video; multimedia interactives; staffed interpretive station; social media; website		
MOTIVATE	<b>4: Positive engagement</b> Experiences that add to the appeal of taking action, beyond the desire to do good Examples: Public pledge; immediate positive feedback; recognition; voluntary commitment; easy, small first steps that can be taken on site; relevant rewards that reinforce the values and behavior.		
FACILITATE	<b>5: Action assistance</b> Tactics that address practical barriers and make it easier for an individual to take action Examples: Opportunity on site; post-visit tools such as informational resources and web links; programs that provide training and practice; direct assistance; action as a fun part of a program; prompts that serve as reminders; other steps to remove practical obstacles		
FACILITATE + MOTIVATE	<b>6a: Supporting relationships</b> Post-visit/program connections that sustain the momentum for taking action, provide a conduit for continued motivation and facilitation and create a sense of community Examples: Communicate after the visit or program with helpful information, reminders, encouragement and recognition; provide tools for sharing with others; create new communities for participants to share experiences and ideas		

**6b: Beyond individual engagement**  
 Does the program leverage individual engagement for change at a higher level (e.g. community, business, local government, federal policy, etc.)? If so, how, and how will you measure success?

Is the program replicable, with the ability to be implemented at multiple institutions, or is it part of an already-replicated program?

Does the program engage groups, such as schools, businesses or communities?

**FIGURE 3** CARE Conservation Engagement Worksheet



## Instructions

At the top of the worksheet, identify the program or initiative and briefly describe its purpose in relation to the organization’s conservation mission and its audience. Think of them as the “three P’s”: *program, purpose, and people*.

- **Program:** Identify the exhibit, program or broader initiative. For an internal audience, it may be sufficient just to name it. If the document is intended for readers who aren’t familiar with the program, include a brief description.
- **Purpose:** How will this program contribute to your conservation mission? It may be part of a conservation campaign, with action as the goal, or its primary aim may be to cultivate caring and understanding, for example empathy-focused programs.
- **People:** Who is your primary target audience? You may focus on one specific audience, or identify more than one, with different goals for each.

**CARE Conservation Engagement Worksheet**

Program (program, exhibit or initiative):

Purpose (primary conservation engagement goals):

People (primary target audience):

	Tool	Program Element
1	<b>1: Inspiring wildlife experiences</b> <i>Physical/sensory experiences with wildlife to foster connectedness; affection; empathy; awe; emotion-based appreciation</i>	

The bulk of the worksheet is for documenting primary program elements and intended outcomes for each, in order of type of tool.

For each tool, under **Program Elements** describe specifically what the program includes in this category. For example, for *inspiring wildlife experiences* (Tool 1), you might indicate that guests will feed giraffes, see a cheetah sprint, or be surrounded by drifting jellies as if they were underwater. For tools that convey information, describe both the

	Tool	Program Elements	Target Outcomes
MOTIVATE	<b>1: Inspiring wildlife experiences</b> <i>Physical/sensory experiences with wildlife to foster connectedness; affection; empathy; awe; emotion-based appreciation</i>  <i>Examples: Eye-to-eye viewing; animals in action; animals interacting with each other or their environment</i>		
	<b>2: Learning experiences that build values and beliefs about wildlife and conservation</b> <i>Communication elements that contribute to cognitive appreciation for</i>		

format (e.g. keeper talk; graphics) and key content (e.g. personalities of elephants; the importance of selecting sustainably sourced seafood). If you are thinking about ways to enhance the value of a program, you could include hypotheticals: we plan to do this (or currently do it), and are considering these other options.

Under **Target Outcomes** identify the objectives, or intended outcomes, of this element. What changes in the audience's feelings/attitudes, knowledge, and/or actions is it designed to accomplish? Defining outcomes is an essential part of any planning or design process. During planning, outcomes serve as criteria that guide design, and for existing programs, they provide a checklist of measures of success. You can choose to make them general (e.g., visitors will be aware that the zoo is involved in giraffe conservation), or specific and quantified (e.g., 60% of visitors will know that the zoo is working in Africa to protect giraffes).

The following quick reference offers examples of program elements, appropriate outcomes, and tips on best practices. Appendix 2 provides a sample completed worksheet.

## Quick Reference: Program Elements and Outcomes

This resource provides examples and descriptions of program elements, appropriate outcomes for each type of program element, and tips on best practices. Insets show the relevant section of the Roadmap flowchart for each Tool (see page 12).

### Tool 1: Inspiring wildlife experiences (*motivate*)

#### Program Elements

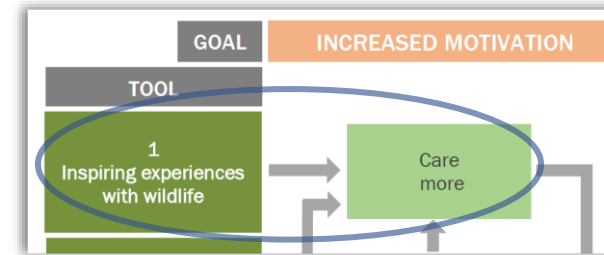
Describe the most relevant aspects of the animal experiences. What will visitors see animals do? In what environment? Are there other senses that will be engaged? Will visitors interact with animals in any way? Examples:

- In an acrylic tunnel, be surrounded by ocean life as if underwater.
- See a cheetah sprint at top speed in a demo.
- Observe a mob of active meerkats socializing, digging and playing.
- Feed giraffes lettuce, supervised by staff.

#### Target Outcomes

Describe the main results expected from just the sensory experience—not the messaging. Program narration and exhibit graphics fall into other categories of Tools, and are listed separately. Outcomes that may result solely from the animal experiences include:

- Increase in positive feelings toward animals, e.g. affection, appreciation, empathy or connectedness
- Feelings of awe or excitement
- Awareness of the animals' appearance, adaptations, habitat and/or behavior
- Judgment of the animals' well-being and quality of care
- Enjoyment of the visit



#### TIPS

The most compelling and memorable animal experiences involve:

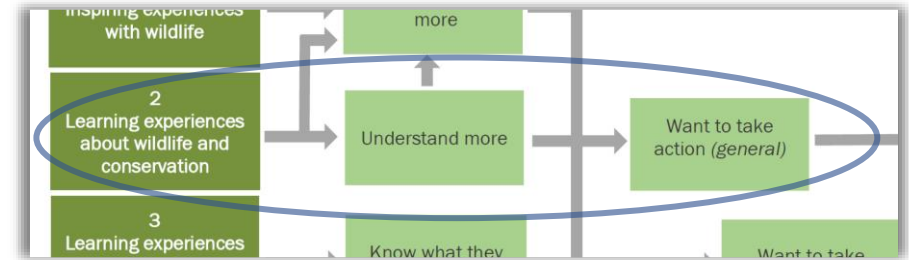
- Seeing animals in action, demonstrating natural behaviors, abilities and adaptations.
- Close/eye-to-eye viewing.
- Interacting with animals.
- Observing animals in settings reflecting their natural habitat, in natural groupings.
- Observing animals interacting with other animals, objects in their environment, or people.

## Tool 2: Learning experiences about wildlife and conservation (*motivate*)

### Program Elements

Describe key ideas conveyed by learning experiences, and the formats they are presented in. Includes all messaging elements, including program narration, graphics, video, interpreter carts, social media, etc. Examples:

- In an elephant training demo, the keeper talks about individual personalities of elephants and how their care addresses every aspect of their well-being.
- Graphics and a staffed interpretive cart with artifacts describe how native plant gardens help local wildlife.
- A graphic with a touchable model of grizzly bear skull compares grizzly diet and dentition to human.



### Target Outcomes

Describe the intended outcomes of learning experiences—what guests will feel or learn. Examples:

- Empathy and/or appreciation for animals
- Knowledge of animal natural history, behavior and ecological relationships
- Knowledge of conservation issues, relevance to their lives, and solutions (in general)
- Optimism that organizations and individuals can help solve conservation problems
- Recognition of the institution's quality of animal care and conservation work

### TIPS

The following best practices are applicable to all content-based experiences, starting with Tool 2 and including Tools 3 and beyond.

- Active experiences are more effective than passive.
- Personal interactions enhance both enjoyment and learning.

### Effective messaging:

- Is accessible, understandable, and enjoyable.\*
- Connects to what visitors are seeing (usually an animal) or experiencing.
- Feels personally relevant to visitors.
- Uses language and imagery that are relatable and memorable.
- Supports a clear and cohesive main idea.

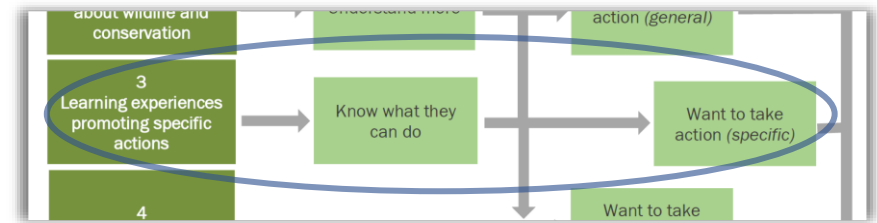
\*To keep conservation messaging positive, highlight solutions, e.g., this is what we are doing; this is what others are doing; and/or this is how people like you are making a difference. Gloomy, alarming messaging causes visitors to shut down emotionally or to stop paying attention.

## Tool 3: Learning experiences promoting specific actions (*facilitate*)

### Program Elements

Describe the specific conservation actions and supporting ideas incorporated into messaging, and where or how they are presented. Includes all messaging elements, including program narration, graphics, video, interpreter carts, social media, etc. Examples:

- A sea lion show incorporates the message "don't suck—skip the straw" to protect ocean life from plastic pollution.
- Orangutan graphics recommend choosing sustainably-sourced palm oil and downloading an app that provides a guide to shopping responsibly.



### Target Outcomes

Describe what guests will learn, feel and do. For action messaging alone, reasonable outcomes include:

- Awareness of helpful actions
- Intent to take the specific recommended action
- Belief that their efforts can make a difference
- Appreciation for the institution for raising awareness of opportunities to take action
- If the action is easy, a small percentage of the most environmentally-minded audience may take action.

#### TIPS

Effective action messages:

- Promote specific, valuable actions your audience can easily take.
- Connect the actions to animals at the institution, describing how each helps protect a particular species.
- Promote a limited number of actions, and present the highest priority action messages in multiple places.
- Are positive and hopeful: lead with the solution; and communicate collective impact.
- Promote the desired behavior rather than criticizing the undesirable behavior.
- Create a sense of the desired behavior as the social norm.
- Use a respected messenger—someone your audience admires and relates to.

*The most successful action campaigns go beyond messaging, using additional techniques to motivate visitors and taking steps to facilitate action (Tools 4 and beyond).*

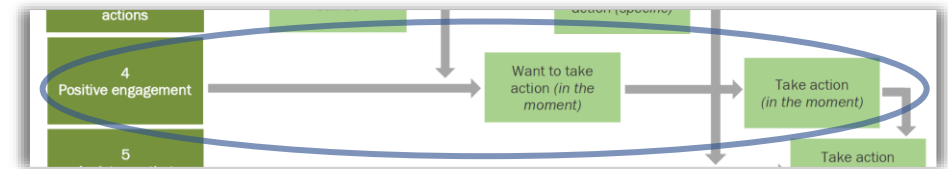
## Tool 4: Positive engagement (*motivate*)

### Program Elements

Describe what you do to increase your guests' enthusiasm and intent through motivators that tap into social instincts and reward-seeking.

Examples:

- Encourage public commitments, especially written pledges, e.g. sign an ocean life mural and get your photo taken pledging to use reusable grocery bags.
- Give immediate positive feedback and recognition, e.g. on website post names of people who pledge online to protect ocean life by celebrating with bubbles instead of balloons.
- Offer cause-related incentives, e.g. coupon for reusable water bottle; appreciation events; printed wristband.
- Acknowledge shared conservation values and partnership: "we know you care about wildlife too—together, we can do this!"



### Target Outcomes

Success in achieving visitor outcomes may be measured in terms of:

- Increased intent to take a specific action
- Action by some members of the target audience (especially easily achievable actions)
- Appreciation for the institution as a conservation organization
- Greater enjoyment of a visit
- Tangible conservation outcomes, e.g. reduction in the number of plastic grocery bags used

### TIPS

Positive engagement is just that: active, positive ways to spark enthusiasm. To be effective:

- It should be an enjoyable part of a program.
- Invite and encourage participation, without pressure.
- The more social, the better.
- Pledges are more powerful with follow-up: a reminder, or even better, checking on completion and giving appreciation.
- Incentives must be something valued and relevant to the issue.

## Tool 5: Action assistance (*facilitate*)

### Program Elements

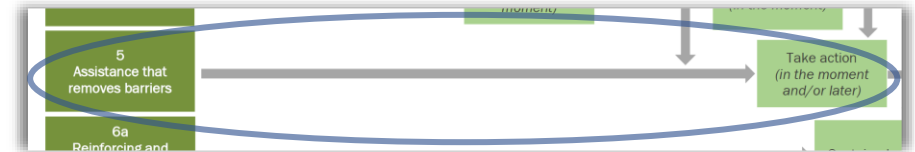
Describe how you make it easier for guests to take action. Examples:

- Provide opportunity to take action on site, e.g. a kiosk to email a message to legislators; postcards to fill out that will be delivered by organization.
- Help visitors take a first step on site, e.g. sign up online for citizen science program.
- Incorporate action into a fun program, e.g. a tree-planting program for families or school groups.
- Provide training or assistance, e.g. offer a program on gardening without pesticides that includes starting native plant seeds to later plant in a home garden.
- Provide prompts that can act as reminders: follow-up email; a car window stat with a reminder to pack reusable bags.
- Provide post-visit resources with information or links, e.g. sustainable seafood app; list of native plants appropriate for local gardens.
- Address practical barriers, e.g., make it easier to find recommended products: identify stores selling pesticide-free plants; certify wildlife-friendly produce.

### Target Outcomes

The primary goal of providing action assistance is to move environmentally-minded guests to action. It also leads to more appreciation for the institution and greater enjoyment of a visit. In some cases the facilitation technique may make action appealing even for those without conservation motivation. Outcomes include:

- Action by a significant percentage of the target audience.
- Appreciation for the institution for assistance in taking action.
- Recognition that the institution as a conservation organization.
- Pride and satisfaction in doing something positive.
- Greater enjoyment of a visit.
- Tangible conservation outcomes, e.g. amount of trash removed from habitat, number of trees planted, number of cellphones recycled.



### TIPS

To be effective in addressing barriers to action:

- Target actions that have real value in addressing a conservation issue, and that the audience can reasonably be expected to take with the organization's help.
- Conduct research with the target audience to identify the barriers and solutions, rather than guessing or assuming.
- Run a pilot of the campaign, survey audience to assess response, and modify as needed.
- Match action appeals to the ability of the organization to facilitate the action.

## Tool 6a: Supporting and Reinforcing Relationships (*motivate and facilitate*)

### Program Elements

Describe how you remain connected with audiences to encourage and reward continued participation and equip participants to invite others.

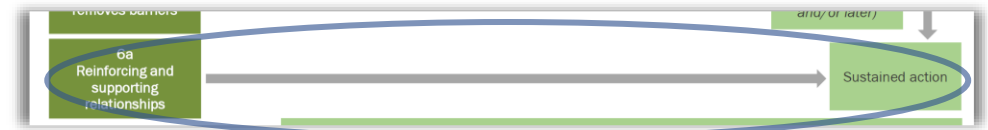
Examples:

- Communicate with guests beyond the visit or program, e.g. providing thanks, helpful information, updates about cumulative impact, recognition, notification of new opportunities, or relevant news.
- Create social media networks for participants to stay informed and connected.
- Provide tools for sharing, so participants can engage others.

### Target Outcomes

Measurable benefits of maintaining relationships include:

- Sustained participation
- Pride in doing something positive
- Feeling of being part of a community that cares and makes a difference
- Appreciation for the institution for assistance and partnership in taking action
- Recognition that the institution is a conservation organization
- Tangible conservation outcomes, e.g. amount of trash removed from the habitat, number of trees planted, non-native plants removed, etc.



### TIPS

To maintain a positive, supportive connection with the audience:

- Communicate regularly.
- Make posts/correspondence fun, interesting and valuable.
- Make participants feel special and appreciated.
- Offer real rewards, such as invitations to events for participants.
- Focus on making continued participation fun and rewarding, and do not turn the communications into constant solicitations for support.

## Tool 6b: Beyond Individual Engagement

The flowchart diagram and Program Elements and Outcomes fields in the worksheet describe how you promote changes in the feelings, attitudes, knowledge and behavior of individual guests. This final section of the worksheet is formatted differently because it represents a strategy that is layered on top of individual engagement. It describes how, with those changes as a starting point, you work strategically to scale up impact for greater conservation value.

### Program Elements

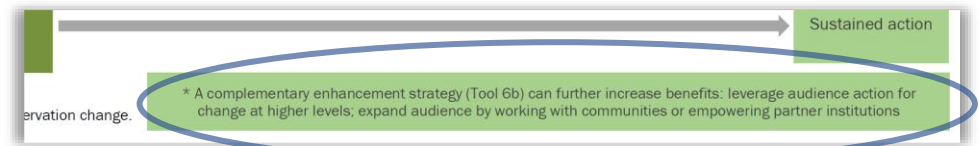
Describe "impact multipliers"—what you do to leverage audience engagement for impact at higher levels (industry, policy, community) or to increase the number of people reached. Examples:

- Compile public comments expressing preference for sustainably produced food products and present to businesses.
- Present public comments on environmental policy to legislators and the media.
- Create kits with messaging, design, and other program elements that allied institutions can use to reach their audiences.
- Engage groups such as companies, schools, and local communities.
- Join efforts coordinated by partner institutions to become an audience multiplier.

### Outcomes

Measures of success depend on the enhancement target, and may include:

- Number of people reached
- Number of conservation actions (e.g. cellphones recycled; trees planted, comments on legislation)
- Higher-level outcomes (e.g. changes in legislation or industry practices)



### TIPS

Motivating and facilitating apply to scaling up impact just as they do to individual engagement:

- To promoting change at higher levels, use public action or comment as a motivating tactic, and at the same time identify barriers to change for that level and work to mitigate them.
- When engaging partners to reach a larger audience, identify what motivates your partners, and what you can do to make it easier for them to participate.
- When engaging groups, motivating factors and barriers are different from those for individuals, and planning should include research with the target groups.



## APPENDIX 1: CONSERVATION ENGAGEMENT WORKSHEET

### CARE Conservation Engagement Worksheet

**Program** (program, exhibit or initiative):

**Purpose** (primary conservation engagement goals):

**People** (primary target audience):

	Tool	Program Elements	Target Outcomes
<b>MOTIVATE</b>	<p><b>1: Inspiring wildlife experiences</b>  <i>Physical/sensory experiences with wildlife to foster connectedness; affection; empathy; awe; emotion-based appreciation</i></p> <p><b>Examples:</b> Eye-to-eye viewing; animals in action; animals interacting with each other or their environment</p>		
<b>MOTIVATE</b>	<p><b>2: Learning experiences that build values and beliefs about wildlife and conservation</b>  <i>Communication elements that contribute to cognitive appreciation for animal; spark awe or empathy; increase understanding of the natural world and our relationship to it; raise awareness of conservation issues and their personal relevance; describe the organization's conservation role</i></p> <p><b>Examples:</b> Program narration such as keeper talk or animal show; graphics; video; multimedia interactives; staffed interpreter station; social media; website</p>		

	Tool	Program Elements	Target Outcomes
FACILITATE	<p><b>3: Learning experiences promoting specific actions</b>  <i>Communication elements that describe specifically what to do and how; cultivate a sense of competence and impact; create a positive outlook; convey positive social norm</i></p> <p><b>Examples:</b> Program narration; graphics; video; multimedia interactives; staffed interpreter station; social media; website</p>		
MOTIVATE	<p><b>4: Positive engagement</b>  <i>Experiences that add to the appeal of taking action, beyond the desire to do good</i></p> <p><b>Examples:</b> Public pledge; immediate positive feedback; recognition; voluntary commitment; easy, small first steps that can be taken on site; relevant rewards that reinforce the values and behavior</p>		
FACILITATE	<p><b>5: Action assistance</b>  <i>Tactics that address practical barriers and make it easier for an individual to take action</i></p> <p><b>Examples:</b> Opportunity on site; post-visit tools such as informational resources and web links; programs that provide training and practice; direct assistance; action as a fun part of a program; prompts that serve as reminders; other steps to remove practical obstacles</p>		

	Tool	Program Elements	Target Outcomes
<b>MOTIVATE + FACILITATE</b>	<p><b>6a: Supporting and Reinforcing Relationships</b>  <i>Post-visit/program connections that sustain the momentum for taking action, provide a conduit for continued motivation and facilitation and create a sense of community</i></p> <p><b>Examples:</b> Communicate after the visit or program with helpful information, reminders, encouragement and recognition; provide tools for sharing with others; create new communities for participants to share experiences and ideas</p>		

**Going beyond individual engagement (Tool 6b)**

Does the program leverage individual engagement for change at a higher level (e.g. community, business, local government, federal policy, etc.)? If so, how, and how will you measure success?

Is the program replicable, with the ability to be implemented at multiple institutions – or is it part of an already-replicated program?

Does the program engage groups, such as schools, businesses or communities?

## APPENDIX 2: SAMPLE COMPLETED CONSERVATION ENGAGEMENT WORKSHEET

### CARE Conservation Engagement Worksheet

Program/exhibit: Africa Tram Tour

Primary conservation engagement goals: **Inspire and encourage guests to care more for giraffe; join WildWatch Kenya citizen science program to help researchers better understand giraffe populations and distribution.**

Target audience: **Any guest with access to a computer; middle school-age and above**

	Tool	Program Elements	Target Outcomes
MOTIVATE	<p><b>1: Inspiring wildlife experiences</b>  <i>Physical/sensory experiences with wildlife to foster connectedness; affection; empathy; awe; emotion-based appreciation</i></p> <p><b>Examples:</b> Eye-to-eye viewing; animals in action; animals interacting with each other or their environment</p>	<ul style="list-style-type: none"> <li>View giraffe interacting with their herd and other African savannah wildlife in a natural setting</li> </ul>	<ul style="list-style-type: none"> <li>Increased affection for giraffe</li> <li>Appreciation for Safari Park's care for the animals</li> </ul>
MOTIVATE	<p><b>2: Learning experiences that build values and beliefs about wildlife and conservation</b>  <i>Communication elements that contribute to cognitive appreciation for animal; spark awe or empathy; increase understanding of the natural world and our relationship to it; raise awareness of conservation issues and their personal relevance; describe the organization's conservation role</i></p> <p><b>Examples:</b> Program narration such as keeper talk or animal show; graphics; video; multimedia interactives; staffed interpreter station; social media; website</p>	<ul style="list-style-type: none"> <li>Engaging with guide to learn more about giraffe (kinesthetic elements – feel your eyebrows – similar to giraffe fur, etc.)</li> <li>Narration by interpretive guide highlighting the behaviors they see</li> <li>Additional graphics in the queue highlighting endangered species including the giraffe</li> </ul>	<ul style="list-style-type: none"> <li>Greater feeling of connection to animals after learning about similarities to humans</li> <li>Increased awareness for family/herd dynamics</li> <li>Motivation to want to help wild giraffe</li> </ul>

	Tool	Program Elements	Target Outcomes
FACILITATE	<p><b>3: Learning experiences promoting specific actions</b>  <i>Communication elements that convey specifically what to do and how; cultivate a sense of competence and impact; create a positive outlook; convey positive social norm</i></p> <p><b>Examples:</b> Program narration; graphics; video; multimedia interactives; staffed interpreter station; social media; website</p>	<ul style="list-style-type: none"> <li>• In narration, describe how field research in Africa is helping giraffes and how anyone can help by participating in the WildWatch Kenya citizen science project</li> <li>• Provide examples of photos from WWK and share current number of photos people like them have reviewed</li> </ul>	<ul style="list-style-type: none"> <li>• Awareness of how their actions can help researchers understand wild giraffe</li> <li>• Interest in participating in WildWatch Kenya</li> </ul>
MOTIVATE	<p><b>4: Positive engagement</b>  <i>Experiences that add to the appeal of taking action, beyond the desire to do good</i></p> <p><b>Examples:</b> Public pledge; immediate positive feedback; recognition; voluntary commitment; easy, small first steps that can be taken on site; relevant rewards that reinforce the values and behavior</p>	<ul style="list-style-type: none"> <li>• Ask guests to take out their phone and bookmark the site</li> <li>• Ask guests to pledge to visit the site on their own and help giraffes</li> </ul>	<ul style="list-style-type: none"> <li>• Increased intent to take action</li> <li>• Appreciation for SDZG as a conservation organization</li> <li>• Greater fulfillment after visit knowing they can help</li> <li>• Some guests will sign up for WWK</li> </ul>
FACILITATE	<p><b>5: Action assistance</b>  <i>Tactics that address practical barriers and make it easier for an individual to take action</i></p> <p><b>Examples:</b> Opportunity on site; post-visit tools such as informational resources and web links; programs that provide training and practice; direct assistance (e.g. kiosk for contacting company or legislator); action as a fun part of a program; prompts that serve as reminders; other steps to remove practical obstacles</p>	<ul style="list-style-type: none"> <li>• Facilitate logging on to Wildwatchkenya.org website with their phones or our tablets</li> <li>• Show a printout of the web address that guests can photograph with their phone or camera</li> <li>• Help guests bookmark the site on their phone</li> </ul>	<ul style="list-style-type: none"> <li>• Guests sign up for WildWatch Kenya</li> <li>• Appreciation for SDZG commitment to giraffe conservation</li> <li>• Enthusiasm to support SDZG and WWK</li> <li>• Conservation benefit: Helps researchers studying giraffe populations by assisting in the labeling of thousands of images in the trail camera image database</li> </ul>

	Tool	Program Elements	Target Outcomes
<b>MOTIVATE + FACILITATE</b>	<p><b>6a: Supporting and Reinforcing Relationships</b>  <i>Post-visit/program connections that sustain the momentum for taking action, provide a conduit for continued motivation and facilitation and create a sense of community</i></p> <p><b>Examples:</b> Communicate after the visit or program with helpful information, reminders, encouragement and recognition; provide tools for sharing with others; create new communities for participants to share experiences and ideas</p>	<ul style="list-style-type: none"> <li>• Encourage following on social media</li> <li>• Encourage guests to share the site with others</li> <li>• Invite guests to become members</li> <li>• Under consideration for the future: Develop a way to recognize and reward participation</li> </ul>	<ul style="list-style-type: none"> <li>• Guests continue to take action</li> <li>• Updates on WWK accomplishments and researchers' work are shared</li> <li>• Increased following/interaction on social media</li> </ul>

**Going beyond individual engagement (Tool 6b)**

Does the program leverage individual engagement for change at a higher level (e.g. community, business, local government, federal policy, etc.)? If so, how, and how will you measure success?

Individual participation in WWK assists researchers in giraffe conservation efforts by helping track changes in giraffe populations and relationship to human activities and other changes.

Guests that follow SDZG on social media or WWK will be encouraged to support a strong Endangered Species Act helping species like giraffe.

Is the program replicable, with the ability to be implemented at multiple institutions – or is it part of an already-replicated program?

Does the program engage groups, such as schools, businesses or communities?

Participation in WWK is also promoted and facilitated for school groups

### APPENDIX 3: MOTIVATING AND FACILITATING FACTORS

Common motivating factors and barriers from the perspective of the individual, along with zoo/aquarium techniques for addressing them (from *From Caring to Action: A Unifying Framework for Audience Engagement*)

MOTIVATE (INCREASE INTENT)	
FACTOR	TECHNIQUE
<b>INTRINSIC/PERSONAL: I think it's the right thing to do</b>	
Caring: <i>I feel a connection to nature or wildlife; I feel affection</i>	Exhibit experiences, programs, and media that increase connection, appreciation and empathy
Understanding: <i>I understand the value of nature; I understand how this affects me; I understand the problem</i>	Accessible, relatable, and memorable information through exhibits, programs, and media
Optimism: <i>I can make a difference</i>	Encouragement; cumulative impact; positive feedback; highlight successful examples
<b>INTRINSIC/SOCIAL: It's what others expect of me</b>	
Belonging: <i>People like me do it</i>	Positive social norms
Social persuasion: <i>Someone I admire convinced me</i>	Trusted and admired spokesperson
Consistency: <i>I said I would do it; it's the kind of thing I do</i>	Durable public pledges; refer to previous action; small ask leading to larger
Acknowledgement: <i>Someone I respect appreciates it</i>	Recognition or public acknowledgement
<b>EXTRINSIC: I get something out of it</b>	
Incentives: <i>I get something I value</i>	Rewards, e.g. coupons; discounts; points toward a prize
Competition: <i>I want to win or get a high score</i>	Competitions; gamification
Entertainment: <i>It's fun</i>	Entertaining games, events or programs

FACILITATE (REDUCE BARRIERS)	
BARRIER	TECHNIQUE
<b>INTRINSIC/PERSONAL: Am I able to do it?</b>	
Knowledge: <i>I didn't know about the problem/ what I can do</i>	Describe specific actions and how they help alleviate the problem
Self-efficacy: <i>I don't have confidence that I can do it</i>	Depict role models succeeding; provide training and practice (e.g. programs w/conservation action component); provide tools (e.g. app)
Ability: <i>I don't know how</i>	Resources; training; practice; tools; app; action kiosk (e.g. send a message to a legislator)
Immediacy: <i>I forget about it</i>	Prompts (e.g. stickers); email reminders
Perceived impact: <i>I don't think it makes a difference</i>	Emphasize cumulative impact; express partnership (we can do this together)
Avoidance: <i>It's depressing; I don't want to think about it</i>	Encouragement; examples of successes; emphasize solutions
<b>INTRINSIC/SOCIAL: Will I fit in?</b>	
Behavior norm: <i>It's not for people like me</i>	Positive social norms; role models
<b>EXTRINSIC: How difficult is it?</b>	
Ability: <i>It's not possible</i>	Address practical factors, e.g. availability of a sustainable product
Convenience: <i>It's too hard, too time-consuming, unpleasant</i>	Make it easy/fun; do it with them; provide opportunity to act during visit

## APPENDIX 4: SELECTING ACTIONS TO PROMOTE

### What Actions Should You Promote?

Not every conservation issue is a good candidate for an audience action campaign. How can you decide what specific actions or behaviors to promote? There are a number of criteria that make a call to action appropriate.

#### **The action relates to the organization's collection and conservation priorities.**

- You have in your collection a species that is threatened by the conservation problem and would benefit from the action. Gorillas, for example, are threatened by coltan mining in their habitat, and cellphone recycling reduces demand for the mineral.
- The conservation benefit may be not for a species in your collection but instead for some other conservation priority for the organization, e.g. an in-situ project in another country; a habitat such as wetlands; a general issue such as climate change; or a group of organisms such as migratory birds.

#### **By taking action, your audience can contribute to the solution.**

- The action should contribute to the solution in clearly identifiable and measurable ways. If enough people take a particular one-time action, e.g. recycle their cellphone, or make a change in their behavior, e.g. refuse straws at restaurants, it can help solve the problem.
- The action should be something new, not something most of your audience already does.

#### **The issue and action connect directly to a visitor experience.**

- Promoting the action or behavior change can be integrated into an experience that visitors enjoy, such as an exhibit or program.

- You can make a direct connection between the action and conservation benefits to ambassador species featured in the visitor experience.
- If the threatened species that will benefit from the action isn't in your collection, you have a proxy. For example, a campaign to prevent plastic pollution in the ocean could feature sea lions, even if the species of concern is a pelagic bird.

#### **It is reasonable to expect that many people will take action.**

- The action relates to the audience's lives and values enough that they will be interested in doing it.
- Either it is easy for your target audience to do, or if not, you can make it easy.

#### Action Campaign Criteria

- ☑ The action relates to the organization's collection and conservation priorities.
- ☑ By taking action, your audience can contribute to the solution.
- ☑ The issue and action connect directly to a visitor experience.
- ☑ It is reasonable to expect that many people will take action.



## Making the Call

For many of these determinations, making valid assessments and acting on decisions takes specific knowledge and skills. If you don't have the expertise on staff, there are many options for tapping into outside sources. You can begin by reviewing published research and internal reports and talking to colleagues who have conducted related projects. You can turn to external sources, such as advisors, conservation partners, or consultants. You also may be able to join an established project such as Seafood Watch or an AZA SAFE campaign.

### Understanding the value of audience action to the conservation issue

- You'll need a solid understanding of threats and solutions. Why is the species threatened, and how can visitors' actions improve the outlook? How, exactly, does taking action help?
- You have to be able to identify valid metrics of success, based on an understanding of how they translate into benefits for the species at risk. For example, if your target action is creating native plant gardens, the number of downloads of a plant guide is not a reliable evidence of new gardens planted (although it is a measure of interest); new gardens registered on a website is a better indicator; and local increases in native insect populations or diversity are the most direct indicator of conservation benefit—but also more difficult to measure.

### Designing, conducting, and evaluating an action campaign

- What specific action will you promote? The key to success is to narrow down a category of action, such as saving energy, to something specific, such as unplugging electronics. Identifying a specific action that has the optimal combination of conservation value and feasibility requires some research.
- What is the best way to promote the action, what might stop visitors from doing it, and what facilitation is needed to overcome those barriers? For anything beyond a simple action that can be completed during a visit or program, it takes research and testing to design these elements of a campaign.

- If it requires work by the organization to increase motivation and reduce barriers sufficiently, you are prepared to provide it.
- You have the means to measure outcomes in order to evaluate success.

## Is It Worth the Effort?

Effective action campaigns require work, sometimes across several departments, and depend on a combination of elements working together. A decision to embark on a campaign should be made with costs and benefits in mind.

### Conservation ROI

- The amount of effort by the organization should correlate to the urgency of the problem and the potential benefit to species. The greater the need and the benefit, the more effort is warranted.
- In general, promoting one-time actions that can be completed on-site or as part of a program is easiest; moving visitors to take action on their own after a visit takes more effort on the organization's part; and getting visitors to change a behavior pattern or commit to an ongoing time investment is the most labor-intensive.

*A decision to embark on a campaign should be made with costs and benefits in mind.*

## Other value considerations

- The value of individual actions can be much greater if you leverage them for change at a higher level. For example, having visitors send a message to legislators is good, but collecting those public comments and delivering them to legislators in personal meetings can be much more powerful.
- A campaign that is replicated at multiple sites reaches more people, for greater collective impact. Imagine the difference in impact between one zoo or aquarium's guests urging companies to use only sustainably-sourced ingredients versus guests from a hundred institutions.
- The effort to develop a campaign can be reduced and the value increased when collaborators work together to share the workload and expertise.
- Learning outcomes may factor into the value of a campaign. For example, having visitors sign postcards in support of the Endangered Species Act can raise awareness of the ESA's importance and cultivate a sense of conservation self-identity, with possible future benefits that may be considered as worthwhile as the immediate potential to influence policy.
- Donations may be considered a value-added action from the institution's standpoint, but asking for contributions too often can annoy guests. Use requests for donations sparingly and with care. Never put people on the spot, and balance contributing money with other helpful actions individuals can take. To make donating more enjoyable: describe benefits in concrete terms such as numbers of acres protected; make it painless, as with "round up" options at transaction points; offer something in return, like a themed wrist band; make it fun, like having a donation device respond with a tiger's roar; and/or ask for donations to valued conservation partners rather than the institution itself.



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Page 6 (left) Houston Zoo; (right) Cheyenne Mountain Zoo

Page 7 Houston Zoo

Page 9 (top) Retrieved from [www.safecat.org.au](http://www.safecat.org.au) October 29, 2020

Page 9 (bottom) Cincinnati Zoo and Botanical Garden

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