Agenda of the workshop

- Peter Fischer, DG REGIO: "2017: Time for a dual assessment – legal requirements in the area of communication"
- Astrid Henningsen. Evaluation consultant – measuring and evaluating communication strategies and actions
- Introduction: main principles of communication evaluation
- Beyond output measurement
  - Choosing indicators and how to feed them – and inputs from selected plans
  - What do you do - Exchange of practice between the workshop participants
- Working with surveys: how to design and things to keep in mind
- Presentation of a communication evaluation toolkit
- Closing

Key principles
Key principles of communication evaluation

- The baseline for your communication evaluation is your communication planning
- Without baseline, it becomes virtually impossible to focus your evaluation (and to judge on its effectiveness)
- Measurement and evaluation of communication activities should be introduced at the earliest stage of your communication planning

Key principles of communication evaluation

Any evaluation should have reference to the original purpose, intentions and expectations (objectives) – and associated...
- Your target audiences
- Your key messages/content
- Your communication tools
- And context (what else is going on – how will communication contribute)

Key principles of communication evaluation

- Outcome based planning of communication activities, considering and mapping out the effect that the intervention is expected to bring about is crucial.
- This requires consideration and mapping of the intervention logic of our communication – how the communication is expected to generate change (otherwise attribution is impossible).
- Includes: How the intervention is intended to support the management or policy objectives (OP/cohesion policy programmes)
  - Development objectives (e.g. engagement of stakeholders in policy development, informing about a new programme)
  - supporting programme implementation engaging new applicants and developing their capacity (new behaviours) or
  - Generating public support to elements of the OP.
Key principles of communication evaluation

- The more specific (SMART) your objectives are, the easier becomes
  - Indicator definition
  - Data collection and
  - Judgement

Key principles of communication evaluation

- Measurement should close to real time – or at real time
  - Capturing effects on engaged audiences is often impossible once your activity is finished (recall)
  - Linking to your activity is typically challenging (attribution issues)
- Data needs analysis and evaluative capabilities.
- How do you follow up? When do you need evaluative data to ensure that you improve
Beyond output measurement

- A lot of communication evaluation tends to focus on reporting on activities (what did we do?) and outputs (reach)
- Also a tendency to focus on “how many” (e.g. how many participants) – rather than “did we engage the right ones?”

Inputs, outputs, outtakes (results) and outcomes

- Note: your own activity is not an output – it is an input. Your reach is your output.
Principles for choosing indicators

1. Indicators should be set out when planning the intervention, and before you implement any activity

2. The indicators/performance metrics chosen – and measurement - should reflect the different levels of your intervention/intervention logic – i.e.
   - Planned activity/input
   - Expected outputs
   - Outtakes/results
   - Outcomes

Key principles of communication evaluation

- What we aim at is comprehensiveness … But pragmatic …
- Some measurement is costly or unpractical – e.g. in some cases outtake measurement may be costly, but it may be possible to measure intermediary outcomes
- In some cases interventions may go no further than generating outtakes (awareness or understanding)
- Consider what would be ideal to measure and then what is practically feasible
- A limited and careful chosen framework is better than one trying to capture everything
- Avoid measuring just what is convenient/easy – evaluation is first and foremost about learning and improvement

Principles for choosing indicators

1. The indicators should reflect the type of audience targeted, the size and how they are reached
   - How you reach an audience is important to measure. Will you reach the target audience directly – or will you reach it indirectly (i.e. 3rd party communication)?
   - If indirectly – it is typically important to measure if the information is a) relayed and the content “appropriately” relayed by your direct/engaged audience (e.g. survey, media analysis etc.) or other forms of engagement

2. Consistency and comparability should be ensured
   - The same activities should use the same metrics – and when possible measurement used should allow for comparing effect over time
   - Ensure that monitoring allows measurement of progress (especially for regular monitoring of continued activities)
Principles for choosing indicators

1. The indicators should reflect the communication tools used
   - Some communication tools have their own indicators – and some communication tools and indicators require their own data collection tools
   - Using quantitative indicators often can work together with qualitative research

- Many communication tools have multiple standard indicators
- Use multiples for own monitoring – and continued improvement
- KPIs: pay attention to choosing the one which reflect best what you are trying to achieve – and which indicate best success
A few examples of how to think of outtake and outcome indicators

Objectives

• Generating new beneficiaries
  - Main activities: awareness raising via a set of planned events for potential applicants
  - Improving public awareness of the success of the programme and the added value the programme has brought to the region – young people 14-18
  - Main activities:
    - Website with supporting educational material/content
    - Engagement of organisations involved in public outreach on EU affairs (e.g. the EDCs)
    - Social media campaign
    - Competition

Objective: New applicants/beneficiaries

<table>
<thead>
<tr>
<th>What to measure</th>
<th>Indicator</th>
<th>Measurement options/suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output indicator</td>
<td>Share of participants/organisations to project application seminars not having benefitted from the programme in the past</td>
<td>Include this as a mandatory question in the event subscription form</td>
</tr>
<tr>
<td>Outtake indicator</td>
<td>Share of event participants aware of specific funding opportunities or have gained new knowledge (indicating that the event met their information needs)</td>
<td>Post event survey (online) (May want to use routing ... And comparison between new and old beneficiaries)</td>
</tr>
<tr>
<td>Intermediary outcome indicators</td>
<td>Increase in Questions from potential beneficiaries (New subscribers to newsletter – download of publication for new applicants)</td>
<td>Question to be included in the online Q/A form (if used) – or automatic email satisfaction survey.</td>
</tr>
<tr>
<td>Final outcome indicator</td>
<td>Share (and increase) of applicants not previously benefitting</td>
<td>Monitoring data on new applicants collected as part of general monitoring system (successful and unsuccessful)</td>
</tr>
</tbody>
</table>

Objective: awareness among young people

<table>
<thead>
<tr>
<th>What to measure</th>
<th>Indicator</th>
<th>Measurement options</th>
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</thead>
<tbody>
<tr>
<td>Output indicator</td>
<td>Number of teachers contacted</td>
<td>Monitoring data on outreach activities</td>
</tr>
<tr>
<td>Outtake indicator</td>
<td>Number of prospective partner organisations</td>
<td>Survey among teachers</td>
</tr>
<tr>
<td>Intermediary outcome indicators</td>
<td>Feedback on quality and usefulness of educational material (from teachers) Number of partner organisations indicating their interest in organising activities for the target audience</td>
<td>Survey among prospective campaign partners</td>
</tr>
<tr>
<td>Final outcome indicator</td>
<td>Number of young people reached</td>
<td>Survey among partners</td>
</tr>
<tr>
<td></td>
<td>Download of educational material, games etc. from website</td>
<td>Web statistics</td>
</tr>
<tr>
<td></td>
<td>Number of events organised by partners Number of young people participating in competition organised Social media engagement and sentiment</td>
<td>Competition statistics Social media monitoring (e.g. Facebook insight)</td>
</tr>
</tbody>
</table>
Examples of outtake outcome and context measurements from a sample of strategies

<table>
<thead>
<tr>
<th>Type of indicator(s)</th>
<th>Measurement system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner awareness of KO of programme &amp; Increased awareness of programmes news (outtakes)</td>
<td>Annual partner survey</td>
</tr>
<tr>
<td>Social media engagement (followers and engagement rates)</td>
<td>Social media monitoring tools</td>
</tr>
<tr>
<td>Staff knowledge (informed and kept up to date on programme developments and news) (outtake)</td>
<td>Informal feedback from staff, results of annual internal survey (Internal communication)</td>
</tr>
<tr>
<td>Media coverage of the programme (output)</td>
<td>Media monitoring (media hits)</td>
</tr>
</tbody>
</table>

Examples of outtake outcome and context measurements from strategies

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<th>Type of indicator(s)</th>
<th>Measurement system</th>
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<tr>
<td>Public Attitude and Awareness of the Structural Funds (context and impact measurement)</td>
<td>Public opinion poll</td>
</tr>
<tr>
<td>Number of people dealt with/accessing information (website and social media) - output</td>
<td>Online and social media monitoring</td>
</tr>
<tr>
<td>Satisfaction with information provided by the programme at event (outtake)</td>
<td>Event feedback forms</td>
</tr>
<tr>
<td>Awareness of the programme and achievements among stakeholders and potential beneficiaries – as measured via increased use of website (as the unique hub of information)</td>
<td>Web statistics</td>
</tr>
<tr>
<td>• Increased number of unique sessions on programme website</td>
<td></td>
</tr>
<tr>
<td>• Increased number of unique page views on project websites on the programme website</td>
<td></td>
</tr>
</tbody>
</table>

Measuring outtakes/results – your experience

- What indicators have you included in your strategy to measure results and outcomes
- What works to measure and evidence results and outcomes (what does not)
- Which challenges do you encounter – have you encountered in the past measuring your communication efforts
- Cost vs. benefits

- In Member States having a two layered communication approach (national And sub-national) – what is your approach to communication evaluation
- Use of common indicators?
- Use of common framework?
Some observations on surveys

Working with surveys

- Questionnaires are among the most used measurement tools for communication
- For monitoring and (internal and external) evaluation
- Assumed an "easy tool" .... but many potential issues with survey designs
- Badly formulated question provides results of limited use

Strengths of surveys

- Provides "easy to access" quantitative data to feed your outtake indicators
- Delivers easy to understand results (90% said that XXXX)
- Provides – ideally – results applicable for the whole population – either directly or via sampling
- You can collect information among large groups at "relative" low cost
- Easy to manage (in particular online ones)
- You can interact with people that you may not be able to reach by other means
- You can test the validity of theory/ explanatory model on large audiences
Type of surveys

- Surveys can be done:
  - Using paper (e.g. Hand out & post)
  - Online
  - On the phone (e.g. public opinion polling)
  - Face to face (e.g. on the spot)

Strengths and weaknesses of surveys

<table>
<thead>
<tr>
<th>Type</th>
<th>Good for</th>
<th>Bad for</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>Conferences, trainings</td>
<td>Non IT literates</td>
<td>Cheap</td>
<td>Self selection</td>
</tr>
<tr>
<td></td>
<td>Non IT literates</td>
<td>Complex issues/require explanation</td>
<td>Self administration</td>
<td></td>
</tr>
<tr>
<td>Online</td>
<td>MOST TYPES</td>
<td>Complex issues/require explanation</td>
<td>Self administration</td>
<td>Self selection</td>
</tr>
<tr>
<td></td>
<td>MOST TYPES inc. complex issues</td>
<td></td>
<td>Cheap</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Easy to promote</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>MOST TYPES</td>
<td>Complex issues/require explanation</td>
<td>Good reliability</td>
<td>Costly</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Clarification possible/hard to know</td>
<td></td>
</tr>
</tbody>
</table>
| Face to face | Conferences/events, studies requiring high degree of reliability - Complex issues | Good reliability | Costly |}

Conditions for using surveys

- In nearly all cases surveys are only useful when you know what you want to observe (You cannot raise the "why" question)
- You mostly cannot collect answers that you do not already know
- You mostly cannot collect data on conditions for success (or failure) - But you can test hypothesises
- If you have a credible and sound theory/explanatory model – before setting up your survey
Some key challenges – incl. for comm

- Quality survey results can only be obtained if you survey people on something they actually know something about
- If recall is likely to be low you cannot use online surveys
- Beyond poll most surveys are generally not representative
- Badly formulated question provides results of limited use (and bias in your results)
- Small samples and self selection

Actions to ensure greater relevance

- Carefully define what exactly you want to measure
- Design Q/A options ensuring that all possible options are available
- Test your survey
  - The pre-test or piloting of the survey is important to ensure relevance (does it talk to your audience)
  - And to ensure that your audience understand the questions
- Can be done by:
  - phone/or online testing followed up by interview or
  - Focus group

Make it short

- As a general rule: the population is not interested in filling in surveys – and in particular not long surveys
- Accordingly surveys need to be short and concise
- Ask only questions where you really need an answer (don’t ask if it is useful if you do not need to know)
- Avoid items such as name, address, age etc. (unless you actually need them for some specific purpose)
- Limit open-ended questions to a minimum
Type of information you can gather

- **Descriptive:**
  - Background information (age, family/employment status etc.)
  - What people or organisations do, have done, intend to do or could possibly do
  - What they know
  - How they know
  - What they have used or not used

- **Normative (rating):**
  - Usefulness
  - Benefits
  - Relevance given needs

- **Causal:**
  - What has been the result of X or Y
  - What would have happened if the intervention had not taken place

**Descriptive questions**

- Descriptive questions have a high reliability – they tend to give the best survey results
- Descriptive questions may be hidden normative questions (instead of usefulness you ask for use)

**Normative questions**

- Usefulness
- Appropriateness to needs

- Typically scaling questions:
  - Very useful – not useful (items)
  - Strongly agree – Strongly disagree (statements)

  - Instead in complement
  - Would you recommend
  - etc.
Normative questions

- Typical scaling questions are less useful to measure relative importance (everything is important ….) consider:
  - Relative rating – allocation of points

Use of open-ended questions

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondents can use own wording</td>
<td>Slow to administer</td>
</tr>
<tr>
<td>Rich information</td>
<td>Difficult to analyse</td>
</tr>
<tr>
<td>May discover new things:</td>
<td>Not possible/difficult with large samples</td>
</tr>
</tbody>
</table>

Open-ended questions

- Issues to consider when using open-ended questions:
  - Good and passive in particular when you have no clear idea about the opinions of the respondents
  - Work well in cooperation with close-ended questions
  - But more complex and more expensive
  - And has to be treated causally when working with post categorisation
**Ensure ease of access**

- Organise questions around specific headings for ease of use – e.g.
  - Background information
  - Use
  - Utility (normative questions)
  - Results (causal questions)
  - Close

- Use filtering where relevant – ensuring that the questions are relevant to the user – and those who does not have a basis for judgement does not receive irrelevant questions

**Tips and tricks for questions**

- Self administered questions: understanding of questions crucial
- Avoid bias in questions – have others check
- Do not use more that 4-7 categories in normative Q (not possible to differentiate)
- If you use 1 to 5 specify what you mean by the different numbers
- Highlight/underline key points in your question if the question is long
- Consider – can you use descriptive in complement to normative
- Straightforward questions

- Do not repeat questions
- Avoid negative terms – always avoid double negation
- Often clearer to make a statement and ask for agreement – than asking a question
- Do not ask questions that people cannot reply/not likely to know – e.g. what did somebody else in your organisation do
- Explore answer options (in particular for descriptive data)
- Only one question per question!
Other

- Use of intro text – set out the objectives of the survey
- Only one question in each question!!!!

Collecting replies

- When N=small, very small changes in responses will generate big differences in % results (here N=30 - change is Reponses= 3)
- If N=30 but intervention group is soo..... Results unreliable
- Must aim at maximising response rates

![Pie chart]

30% Satisfied
70% not satisfied

43% 57%

Actions to maximise response rates

Response rates may be improved by
- Time dedication – and not very last item on the agenda (events)
- Adequate promotion (personalised mails – not social media) – and follow up experience:
  - 6/10 of responses 1st promotion
  - 3/10 - 2nd promotion
  - 1/10 3rd promotion
Toolkit: how to evaluate communication

- Toolkit designed for the European Commission to plan for measurement and evaluation of their communication activities
- Guidance documents on:
  - Objective setting for communication and intervention logics
  - Guidance on the design of indicator systems – and choosing indicators
  - Press and media
  - Public and stakeholder engagement
  - Campaigns and advertising
  - Online and social media activities
- Cost indications for different evaluation methods and tools (when contracted)
  - What impact on costs (and what does not)
  - Price ranges

- Overview of different evaluation methods
  - Qualitative research tools (e.g. focus groups, case studies, participatory observation)
  - Surveys (print, phone, online, tracking studies, polls)
  - Tools for online media (needs updating)
  - Various: audit of content; benchmarking; mystery shopping; advertising measurement etc.

- Covers
  - Short presentation
  - Advantages
  - Helps to inform
  - Key issues
  - Relevant for the evaluation of .....
Toolkit: how to evaluate communication

Small scale evaluation tools
• How to evaluate Conferences
• How to evaluate Newsletters
• How to evaluate Websites
• How to evaluate PR events
• How to evaluate Press events
• How to evaluate Social media activities
• How to evaluate Smartphones applications
• How to evaluate Publications

Contains
• Suggested tools for evaluation of the activity
• Step by step approach to the implementation of the tools

Toolkit: how to evaluate communication

Toolkit
• http://ec.europa.eu/dgs/communication/about/evaluation/documents/communication-evaluation-toolkit_en.pdf

Other references
• http://ec.europa.eu/dgs/communication/about/evaluation/index_en.htm
• Examples of survey designs and other designs

Questions?
Thank you for your attention!