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## Are We There Yet? How to Know Whether Your Communications Are Effective

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# Are We There Yet? How to Know Whether Your Communications Are Effective

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## Key Points

- This article describes the results of a study on current knowledge and practices in evaluating foundation communications. The study consisted of three parts: an online survey of practitioners, a series of in-depth key informant interviews, and an extensive literature review.
- The study found that while most practitioners agree that evaluating communications is necessary to make decisions about their communication strategy, more than half did not regularly do so. Lack of experience or skills was the second top barrier cited, after lack of human/financial resources.
- Those who have more experience with evaluation were more likely to feel that it was not too difficult or expensive and that it was important to share results than those with less experience.
- While there are worthy resources on program and campaign evaluation, few tools exist that are specific to evaluating foundation and nonprofit communications. The tangible result of this study was the development of such a tool for communication practitioners.

## Introduction

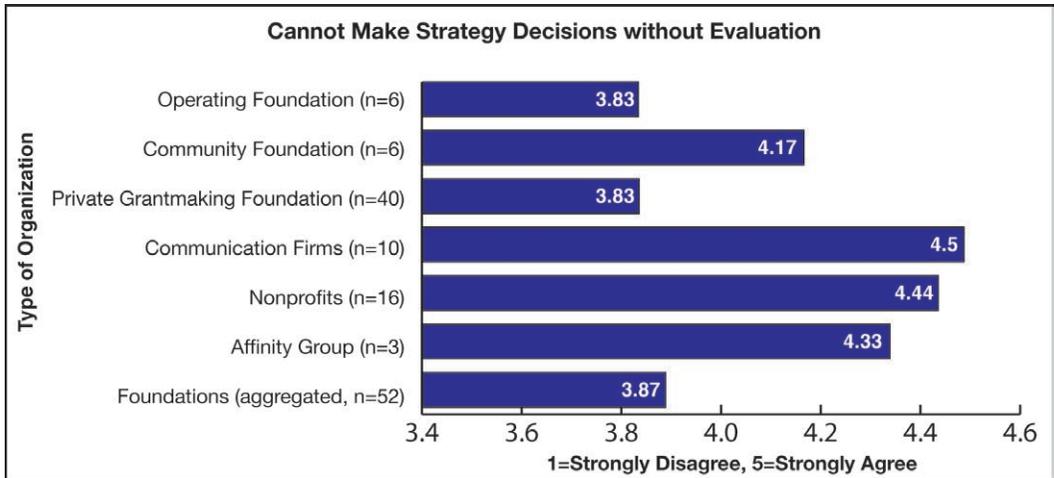
From a foundation's perspective, communication should be more than just publicity: It should include all the ways a foundation advances its own programs and the work of its grantees by connecting with clients, community leaders, the press, donors, peer organizations, funders, and other constituencies (Mackinnon & VanDeCarr,

2009). For this reason, foundations and nonprofits have a vested interest in ensuring that their communications are effective. Yet, anecdotal feedback from members of the Communications Network—foundation and nonprofit communicators and consultants—pointed to a lack of tools, skills, and resources to put in place effective learning systems for their communication initiatives. We presumed that the question of how to assess the efficacy of communications was a concern for many in the field and that with useful knowledge and resources, communicators would be more likely to understand the importance of and take on the task of evaluating their communications.

In partnership with the Communications Network, we undertook a research project<sup>1</sup> to assess the field of communications evaluation and uncover best practices. The methodology consisted of three parts. First, we surveyed practitioners to develop a quantitative assessment of communications evaluation opinions and practices. Second, we conducted a series of 21 in-depth key informant interviews to further probe into the qualitative dimensions of the initial survey results and collect best practice examples. Third, we performed an in-depth literature review of resources pertaining to communication and evaluation. We then analyzed the results of the survey, inter-

<sup>1</sup> The Communications Network research project was conducted by Asibey Consulting and was made possible with the support of the David and Lucile Packard Foundation.

Figure 1 Strategy and Evaluation



views, and literature review to identify gaps in the existing resource base for evaluating communications and to focus on building a solution. Following the discussion of the research results, the latter part of this article covers how the findings informed the development of a communications evaluation tool.

## Methodology and Preliminary Results

### Survey Results

A survey was administered to the Communications Network membership, made up of foundation and nonprofit communicators and consultants working in the field. The survey was sent to 261 people, of whom 81 completed it, for a response rate of 31 percent. Of these respondents, 52 were from foundations, 16 from nonprofits, 10 from communications firms, and three from affinity groups. Of those representing foundations, 40 were from private grantmaking foundations, six from community foundations, and six from operating foundations.

Several key findings emerged from the survey. The responses confirmed that most practitioners agree evaluation is necessary to make strategic decisions about communications (Figure 1) yet few communicators regularly—if at all—formally evaluate their work (Figure 2). After lack of financial and human resources, respondents cited lack of skills and experience in evaluation as the second biggest impediment

to conducting communications evaluations (Figure 3).

Other findings from the survey include the following:

- Practitioners with less evaluation experience found measuring communications more difficult.
- Practitioners who conduct more evaluation were less likely to feel that it is too expensive; practitioners with less evaluation experience cited cost as a major barrier.
- Organizations that more frequently evaluated communication activities more strongly agreed with the importance of sharing evaluation results.

Figure 2 Frequency of Evaluation of Communications

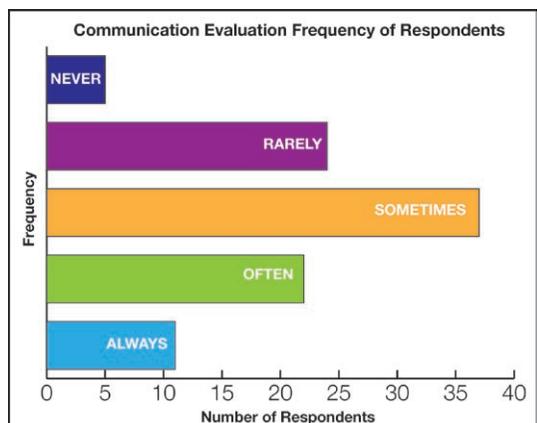
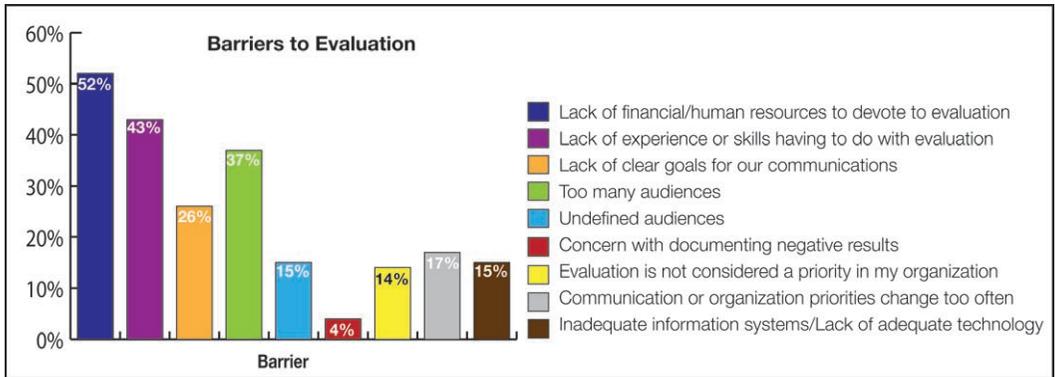


Figure 3 Barriers to Evaluation



- Many practitioners have in place some basis for evaluation: Most respondents reported having a communication strategy; roughly half have established communication milestones and/or indicators, and some use program or communication theories of change or logic models.
- There is a correlation between communication aspects that respondents are most interested in tracking and those they found most difficult to evaluate. These include institutional brand awareness, policymaker outreach, and, to a lesser extent, issue framing.

*Interview Results*

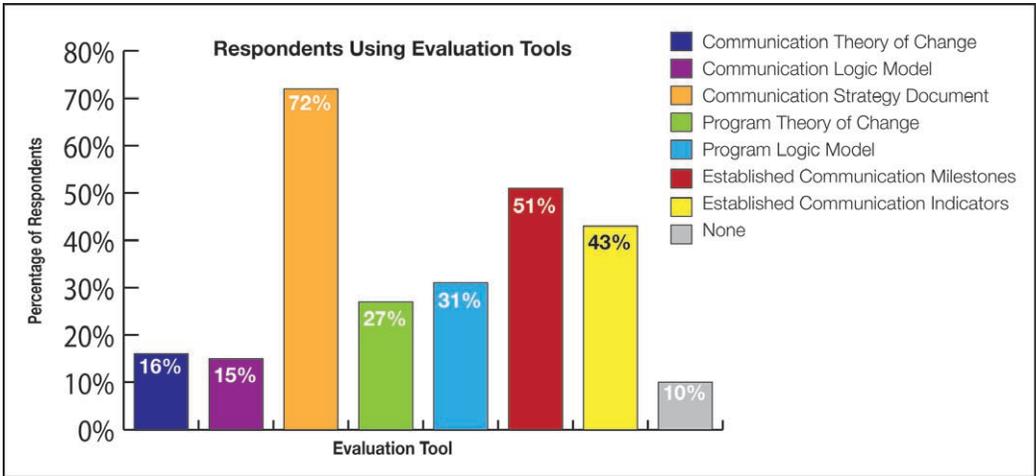
To develop a deeper understanding of the survey results, interviews were conducted with 21 professional communicators and evaluation and philanthropy experts who indicated in the survey that they had prior experience with evaluating communications. The purpose of the interviews was to shed further light on how foundations are planning and implementing their communications strategies, and what role—if any—evaluation plays in this process. The interviews also uncovered examples of different methods used to evaluate communications, as well as various case studies of how practitioners were using evaluation results to improve their work. Key findings from the interviews include the following:

- Although some foundations have conducted or are conducting evaluations of their communi-

cation initiatives, the efforts are rarely systematic. Most communications evaluations are single instances centered around a particular activity (such as a website redesign) and often are focused on tactics. Few foundations look at overall communications strategies and think of evaluation in a holistic way.

- In addition to the predictable lack of time to focus on evaluation, interviewees expressed limitations in their own evaluation knowledge and skills, and pointed to a lack of information and resources to improve these. Although many foundations report having made significant progress in program evaluation, this has not necessarily transferred to communications activities.
- It is important to offer an approach to developing sound metrics specific to communications. Interviewees suggested that new tools for evaluating communications need to emphasize and illustrate the importance of using measurements in context, guided by clear goals and objectives, audiences, messages, and vision of results.
- Existing resources for campaign and/or program evaluation can be applicable to communications but are not always accessible nor easily adaptable. Overall, interviewees noted a lack of specific literature and/or resources pertaining to evaluating foundation and nonprofit communications.
- To develop the field of communications evaluation, interviewees expressed the need for incentives for foundations to share the results

Figure 4 Use of Various Evaluation Tools



of their evaluations—especially of communications campaigns—with others outside of their organizations.

#### Literature Review Results

An extensive literature review<sup>2</sup> of articles, books, reports, guides, and online sources assessed the existing knowledge and available resources on communication and evaluation theory and practice, as well as their applicability for foundation and nonprofit communications. Literature from the philanthropic, nonprofit, corporate, and academic sectors was examined. The review unveiled evaluation reports of communication and media campaigns, various tools to evaluate direct service and advocacy programs, and several communication planning tools. Although the review culled useful and interesting resources on the subjects of philanthropy, campaign and advocacy evaluation, public relations, and communication strategy, no tools were found to assist nonprofits and foundations in designing a strategy specific to communications evaluation.

<sup>2</sup>The authors released a select list of resources compiled from the literature review that is available on IssueLab's Web site (<http://www.issuelab.org/tag/communications-evaluation>).

#### Integrating the Results Into a Practical Tool

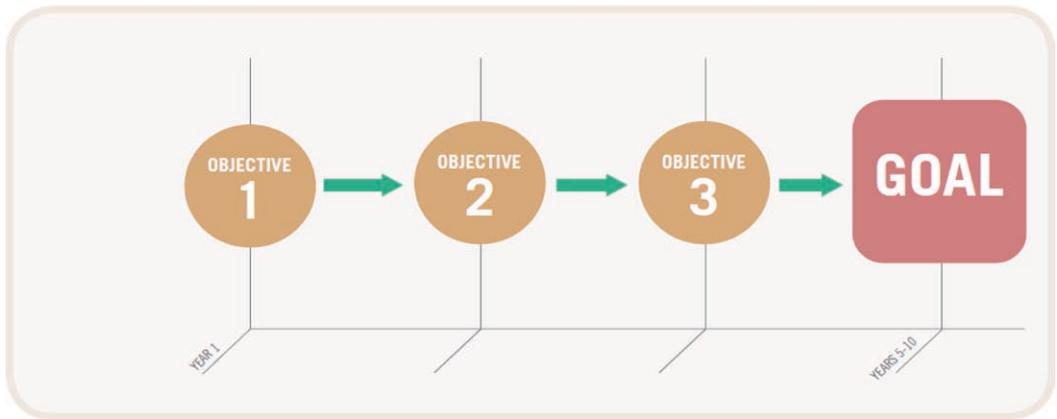
The ultimate goal of the study was to use the findings to develop a relevant communications evaluation tool for communications practitioners at foundations and nonprofits. The result is *Are We There Yet? A Communications Evaluation Guide*. The remaining portion of this article provides an overview of how the research findings informed the development of the guide.

#### Connecting Planning and Evaluation: Goals and Objectives

The research concluded that a well-developed communications plan is a precursor to an effective evaluation (Asibey, Parras, & van Fleet, 2008b). Practitioners must have a clear vision for what the communications are intended to achieve and who the key audiences are in order to effectively evaluate progress and results. The findings from ongoing evaluation can confirm the plan's direction or suggest strategic and tactical midcourse corrections.

Developing an evaluation strategy building upon a communications plan should not be a problem for many foundation and nonprofit communicators, given that 72 percent of the study's survey respondents reported having a communications strategy or plan in place (Figure 4).

Figure 5 Objectives and Goals



The communications plan should include certain features, such as a clearly defined goal and specific audiences. Also, long-term goals must be distinguished from concrete, shorter-term objectives (Figure 5). The goal is the end result that the foundation hopes to attain in a 5- to 10-year period, whereas the objectives are the accomplishments made along the way.

A clear goal and specific objectives are the cruxes of both the communications plan and the evaluation strategy. The process of clarifying goals and objectives is a good opportunity for closer collaboration between communication and program teams, allowing for discussion about how communications can best support programmatic goals. Foundations often set goals that can be advanced by specific communication objectives. For example, the Robert Wood Johnson Foundation focused its communications on the goal of increasing the salience and the political and economic unacceptability of 47+ million uninsured in the United States (Morse, 2008) by working to improve media coverage about the issue.

Given that the research study found that the number three barrier to evaluating communications was “too many audiences,” it is important for communication professionals to commit to a process that identifies the key audiences for both receiving the communications and evaluating their effects (Figure 6). In addition to the audience

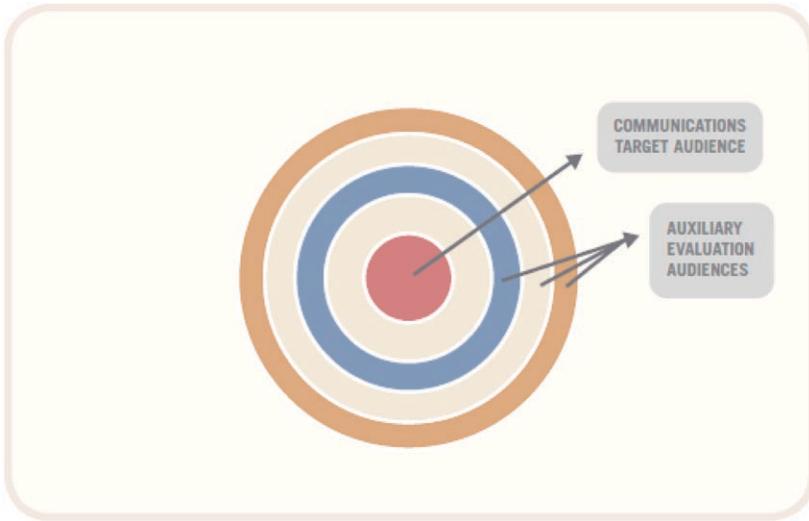
directly targeted in the communication initiative, the evaluation may include people who did not receive the communication messages directly, but whose opinions might inform the implementation of the project. For instance, parents and teachers of children who have been exposed to healthier lifestyle messages should be included in an evaluation of the campaign to offer insight as to whether and how the children were impacted by it.

#### *Identifying the Starting Point*

Once the goal of the communications initiative is clearly identified, practitioners can increase its impact by having a thorough picture of conditions prior to the campaign or project. This baseline information will assist in devising an effective strategy and assessing progress during implementation. For example, if a foundation is embarking on a rebranding effort, program staff must have information about their audience’s knowledge and opinions about the organization before the campaign. This is necessary for comparison with the knowledge and opinions after the campaign to see what impact the communication activities had. There are several ways to establish baselines while keeping the workload manageable. Information to gather may include

- The audience’s knowledge of and attitudes toward the organization and/or issue;
- Common misconceptions and misinformation about the organization and/or issue;

Figure 6 Communication Audiences



- The audience's values that directly affect how they perceive the issue;
- Organizations, issues, or messages that could compete for audience and media attention;
- How the issue has been presented or framed in traditional or social media; and
- Who the "influentials" are who support and oppose the issue.

The example in Box 1 below illustrates the types of information uncovered from a baseline study.

Another example of establishing a baseline comes from a study conducted by the Philanthropy Awareness Initiative (PAI). The study sought to better understand perceptions about philanthropy and the foundation world in the United States by exploring how major news media covered philanthropy in recent history. The study unveiled that just 1 percent of the 38,000 news stories analyzed chronicled the impact of philanthropy; the bulk of the coverage was transactional in nature, focusing on the unique instances (and amounts) of giving and the pro-

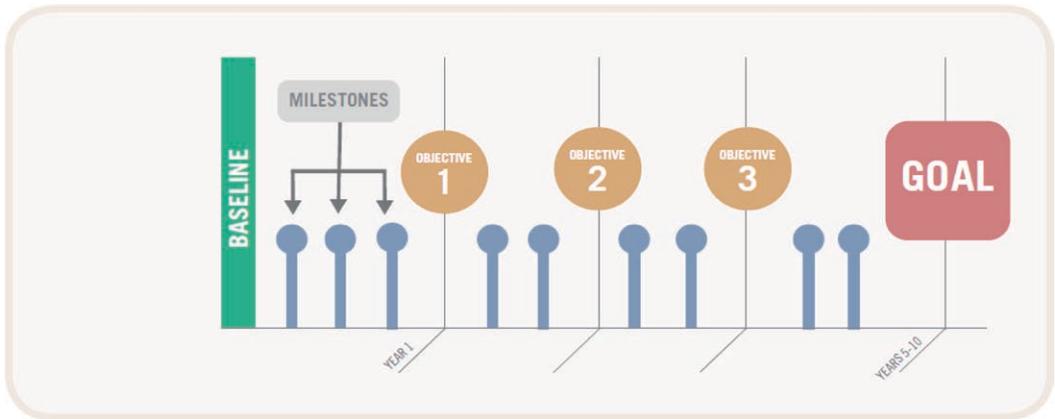
#### BOX 1 Establishing a Media Baseline for Maternal Health

CARE, a nonprofit organization advocating for improved maternal health services in poor countries, recently conducted a media baseline study using monitoring tools that included Google News Archive, Yahoo! News Search, and others. The baseline study uncovered

- How top-tier U.S. media has covered maternal health and infant mortality issues over the last two years;
- How CARE is featured in the media in connection to these issues;
- Which media outlets have had the most coverage on the issues and the type of coverage: news stories, feature stories, editorials, op-eds, and so on;
- Which reporters are writing about maternal health issues and the context surrounding the stories; and
- Whether past news stories included messages about maternal health that are consistent with the organization's advocacy platform (Asibey & Olson, 2009).

Equipped with this information, CARE will be able to assess changes in media coverage over time and determine whether its media outreach strategy is achieving its desired objectives.

Figure 7 Tracking Progress With Milestones



cess of grantmaking (Dropkin, Hope, & Spruill, 2006). The 2006 findings can serve as a baseline as PAI continues to monitor media coverage with an eye toward increases in the coverage of philanthropy's impacts.

#### Questions to Help Guide the Evaluation

Not to be confused with the broader question of whether the ultimate goal has been achieved, evaluation questions are designed to help practitioners guide their assessment and conduct a check on their progress. Among many possibilities, guiding questions may explore message testing, audience response, message dissemination and visibility, media coverage, and evidence of behavioral intention, behavioral change, or policy change. Determining the exact questions to consider depends on the stage of the communication initiative: early, midcourse, or advanced. Following are potential guiding questions for the evaluation, with examples for each stage of a campaign or project:

##### Early stage:

- What is the audience's initial response to my messages?
- Are my chosen spokespeople the right messengers? If so, what evidence do I have of their effectiveness?
- How is the audience responding to my choice of tactics (for example, a YouTube video, a blog, or a Facebook group)?

##### Midcourse:

- Does the audience appear more informed about my organization or about my issue? What evidence do I have?
- Are my messages gaining visibility in the media outlets I have targeted?
- Are there signs of attitudinal change or of higher engagement by the audience? What evidence do I have?

##### Advanced stage:

- Are there any observable policy results? Can I make a plausible case for having contributed to these results?
- Are there signs of change in behavioral intention or behavior change? Can I make a plausible case for having contributed to these results?
- Have I achieved my objectives? If so, how do I reshape my communications going forward?

#### Measuring Progress

After the guiding questions are determined for the evaluation, a logical next step is outlining milestones to signal incremental progress from the baseline to each objective (Figure 7). Milestones can best be described as *progress outcomes*. There is an important distinction between communications outputs and outcomes; we are placing emphasis on the latter. Many foundation and nonprofit communication practitioners already measure outputs by

capturing the scope of their outreach and dissemination efforts. These are the activities that are relatively easy to track: number of publications distributed, Web site page views, blogs launched, presence on social networking sites, media placements, and so on. In contrast, outcomes represent the *results* expected from these outputs. Although seemingly more difficult to track at first, outcomes can provide substantive learning opportunities.

For example, if an organization has distributed 1,000 copies of a publication, this is an output. The milestone to be measured would be the outcome the organization expects from the readers' experience with the publication, such as the percentage of readers who quote the publication or the number of readers who become new subscribers to the organization's communications. It also could include an analysis of the online messages posted by readers mentioning the findings or offering criticism.

Simple measures can show progress toward the milestones. For example, suppose an advocacy organization working on immigration issues is conducting strategic media outreach to reframe the coverage of undocumented immigrants. A progress milestone could be a 50 percent increase in the visibility of the term *undocumented immigrant* instead of *illegal immigrant* in target media within six months. Practitioners would first need to measure the number of times the respective terms are used in their media targets for a period prior to the beginning of the activities; this is the baseline. Then they need to measure the number of times the preferred term is used by the media after six months of outreach, comparing the number with the baseline. If reached, this milestone can demonstrate progress toward an objective of reframing media coverage on certain immigration issues.

Practitioners can refer to the organization's own records and databases to assess prior responses to similar campaigns and outreach efforts and use it as a benchmark to set their own milestones. Additionally, there are publicly available

benchmarks that can be used as a reference. For example, M+R Strategic Services and Non-profit Technology Network (NTEN) recently released the 2009 eNonprofit Benchmark study (Matheson, Ross, & Ruben, 2009), which covers electronic communications results for 32 large U.S. nonprofit organizations during 2007 and 2008.

Those engaging in communications evaluation should be strategic in choosing measures showing real progress toward the milestone, because tracking too much data can quickly become unwieldy. Both quantitative and qualitative measures are important. Whereas quantitative measures provide a numerical measure of communications results, qualitative measures reveal more about their effects. Qualitative measures are often more helpful in determining what is working and what can be improved. Practitioners should strategically select a realistic number of quantitative and qualitative measures.

#### *Selecting Evaluation Techniques*

Once the measurements are determined, the methods to be used for the evaluation must be considered. Focus groups, surveys, interviews, and quantitative analyses are commonly used evaluation techniques. Some of the tools used to measure progress are available online, many at little to no cost. However, it is important for practitioners to research the reliability of the tool, especially because new ones are rapidly emerging to measure online activity. Communication professionals may find that a given monitoring tool provides more comprehensive results than another or that the two provide complementary information and decide to use both.

If the data collection and analysis will be conducted in-house, it is important to ensure that the communication team is well-trained to use the evaluation tools. For instance, when developing interview questionnaires or surveys, the team must be knowledgeable of how to draft properly worded questions that do not lead to multiple interpretations by survey respondents.

An example of how an organization used a survey for their rebranding efforts is provided in Box 2 below.

### *Staffing and Paying for Evaluation*

The study results indicate a common practice of dedicating at least 5 percent of the overall communications budget to evaluation. This percentage can vary greatly depending on the nature of the project and the evaluation. Communicators cannot and need not measure everything. Priorities should be established for different phases of the evaluation and, based on these priorities, the communication team should make budget allocations for evaluation early on during the planning stages. Early budget allocations ensure the team has the ability to use internal staff time and/or external support for the evaluation, pay for monitoring tools, and cover expenses associated with the publication and dissemination of findings.

It is wise to realistically assess the in-house capacity to carry out evaluation activities alongside other day-to-day responsibilities. Additional staff or shifting of priorities may be needed. Another possibility it is to secure support from an in-house evaluation team or an external evaluator with experience in communications evaluation.

### *Using What We Learn From Evaluation*

Evaluation results can contain surprising information and organizations should allow time for reflection. If a team is monitoring progress on

a continuous basis, quarterly meetings may be appropriate to discuss evaluation findings and take any necessary actions. Reflecting upon what works and what does not—as well as talking about the possible need for course corrections—will be time well spent. If an external evaluator is in place, she or he can provide timely updates to the communication team during implementation. This feedback may spur possible strategic or tactical changes.

In addition to disseminating results within one's own organization, it is highly encouraged that practitioners share evaluation processes and findings with peers in the philanthropic and nonprofit communities. This can be done through blog postings, conference presentations, and publications. Peers can benefit greatly from learning about different communications evaluation approaches and the results they unveil. Several venues welcome this information and promote peer-to-peer exchange, including IssueLab, PubHub, the Communications Network blog and Annual Conference, and the American Evaluation Association Annual Conference.

### **Conclusion**

Overall, communications practitioners reported limited skills, knowledge, and resources pertaining to communications evaluation. At the same time, they are eager to use evaluation to assess the effectiveness of their communications. Based on these findings, a communications evaluation

#### **BOX 2 Using a Survey to Inform The Wallace Foundation's Rebranding Efforts**

"As an example of front-end research, we conducted a survey that found that our audiences perceived The Wallace Foundation as being smart and knowing a lot—but that the knowledge wasn't always getting out. This was crucial information for our rebranding effort, because such efforts are most successful when they build on existing perceptions of strength and don't try to do the implausible. Using data on external perceptions of Wallace, and internal aspirations, we mapped out a brand identity focusing on knowledge that included a new look and a tagline.

"We carried this through our communications efforts, including our website, which we completely redesigned to foreground useful lessons for both grantees and non-grantees in such areas as strengthening leadership in public education, expanding arts participation and improving out-of-school-time programs for children. As a result of the research and marketing efforts, we have been able to lift our visitors from 50,000 to more than a million in a year while downloads have risen from several thousand a year to 100,000 per year."—*Lucas B. Held, Director of Communications, The Wallace Foundation* (as cited in Asibey, Parras, & van Fleet, 2008a).

guide was developed to provide practitioners at foundations and nonprofits with a concrete evaluation strategy tool.

Conducting evaluation requires an upfront investment in planning and an ongoing commitment to establishing milestones, monitoring and analyzing data, making course corrections, and reviewing and disseminating findings. When done properly, it can significantly enhance the outcomes of a communication initiative or program. Conducting ongoing evaluation can improve the collaboration between foundation communications and program teams, because the evaluation findings will shed light on how the communications are contributing to the program's goals.

Communication professionals can improve their own practice and effectiveness by incorporating evaluation into their annual work plans and as an ongoing activity. For more time-intensive and complex projects, they may partner with in-house evaluation teams or recruit external evaluators with experience in communications. Finally, sharing evaluation findings can expand the body of knowledge for the foundation, its grantees, and its peers—a knowledge that will directly benefit their long-term goals.

*Are We There Yet? A Communications Evaluation Guide* is available free of charge and can be downloaded at <http://www.comnetwork.org/node/247/>.

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