

Monitoring and evaluating communications

How to measure what matters

Natasha Roe, Red Pencil

What is monitoring and evaluation?

*“**Monitoring** is the routine and systematic collection of information against a plan. The information might be about (communications) activities, products or services, users, or about outside factors affecting the organisation or project.” (KnowHow NonProfit)*

*“**Evaluation** is about assessing the value of the communications activities and outputs and how they are contributing to the organisational vision. (Red Pencil)*

Do you collect data on communications to help with planning?



2015 survey by Social Misfits, Just Giving and Institute of Fundraising

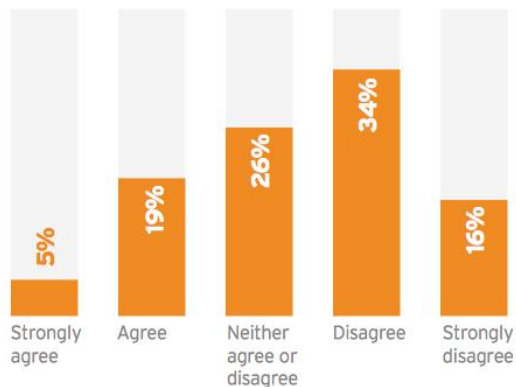
Data Survey

In June 2015, we surveyed 100 charities about the way they collect, analyse, and use data to inform their fundraising strategies.

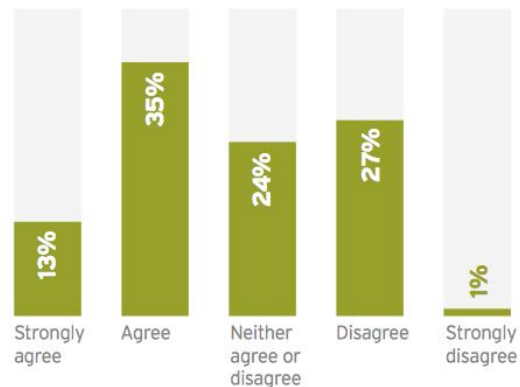
A majority of the charities we surveyed told us that they are struggling to get started:

- 57% said they find it difficult to collect the data they need.
- 82% said that when they do collect the right data, they don't have the time to analyse it properly.
- Only 24% of the charities we surveyed were collecting, analysing and implementing data as part of their strategic planning and decision-making.

We routinely collect, analyse, and incorporate our data to be part of our strategic planning and decision making.



When we collect the right data, we don't have the skills to analyse it properly.



Why do you need monitoring and evaluation?

“*Without evaluation, we would not know where to start with our communications and we would have no idea as to the impact of our communications activities. The impact of all communications activity can be measured objectively.*
(Westminster City Council)

“*As a result (of evaluation) we estimate that associations, including charities, could obtain a 10-25% enhancement of communications cost-effectiveness.* (Jenkinson and Sain, 2004)

Challenges

- How can I evaluate when I don't have time to finish everything on my to do list?
- No-one ever reads the Google analytics reports I write.
- Can you even measure the ROI of a selfie?
- With 2,000 Twitter followers how will anyone ever remember what I post?
- Facebook likes, don't save lives.

Evaluation process

Strategy

- Impact
- Outcomes
- Objectives
- Outputs

Communications

- Activities
- Resources
- Targets

Data

- Quantitative
- Qualitative
- Tools

Audiences - who are you trying to influence?

- Define your audiences – get specific.
- Then you can measure:
 - Reach (you)
 - Knowledge (theirs)
 - Attitude (theirs)
 - Behaviours (theirs)

Audience analysis

Beneficiaries (who gains)	Supporters (who helps)	Stakeholders (who has influence)
Who can help you reach them? (Amplifiers)	Who can help you reach them? (Amplifiers)	Who can help you reach them? (Amplifiers)

Deciding what to measure

- Embedding monitoring and evaluation can take time.
- Can seem overwhelming.
- Start small and build – e.g. e-mail marketing, website content, Twitter engagement.
- Could also take one audience segment or behaviour you're trying to change.
- BUT trace effects and impact of activities through strategy to your vision.

Stacking up your comms strategy

Impact

- Change described by your vision/mission (organisation)

Outcomes

- Short-term and longer term changes (organisation)

Objectives

- What you want to achieve – your goals (communications)

Outputs

- Things you produce and can measure (communications)

Activities

- What you do (communications)

Inputs

- The resources available (communications)

Resources – people, money & time

Team – who is responsible?	Team – who needs to deliver?	What is your budget?	What channels are available – owned and brought?
What's your timeframe?	What are your key messages?	Who are your audiences?	What are your calls to action?
Who needs to know what information?	How are you going to make decisions?	Do you have the right expertise?	What are your milestones?

Communications activities – what you are doing?

Write blog	Send out newsletter	Run PR and media campaign	Run online poll
Put on an event	Run a social campaign	Develop a website	Write a fundraising DM
Update membership offer	Update information leaflets	Build brand	Start LinkedIn discussion
Set up petition	Share ambassadors' content	Make a video	Commission photography
Post to Instagram	Publish magazine	Write annual review	Set up a JustGiving page

What you can measure (outputs)?

Website hits and downloads	Video / audio views	Facebook likes	Twitter followers
Media coverage and reach	Newsletter opens and links	Event attendance	Publications distribution
Calls to helpline	Email requests for information	Blog comments	Content shares and engagement
Sales	Membership sign-ups	Petition signs	Donations!

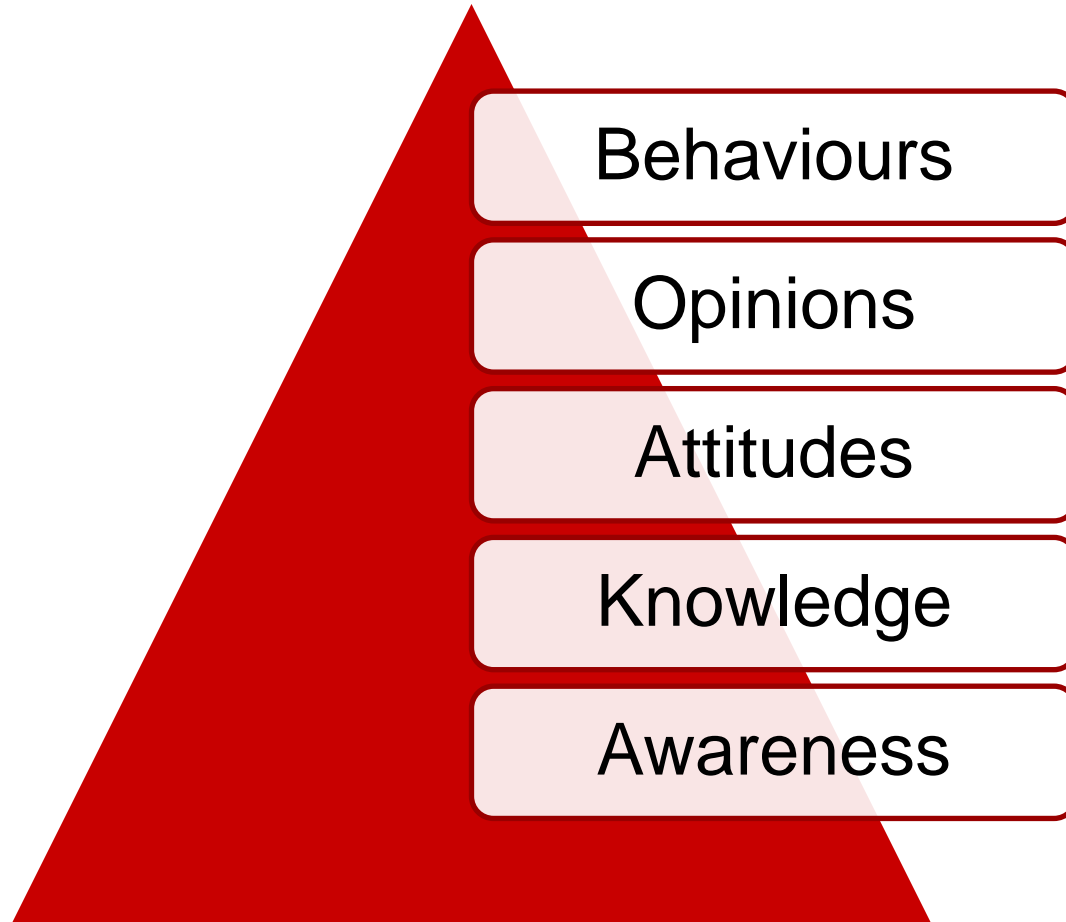
Measuring the numbers - tips

- Take baseline numbers.
- Agree intervals to measure – balance between monitoring and delivering.
- Agree tools – use consistently across charity.
- Build time for monitoring into work plans.
- Be clear about whose responsibility it is!
- All outputs relate to outcomes – the changes you want to achieve.

Setting your goals (objectives) - what do you want to achieve?

Raise awareness	Thought leadership	Generate donations	Solve someone's problem
Campaign for change	Get help to people	Recruit more members	Promote brand
Share information	Reach more beneficiaries	Provide advice	Get people to take action

Measuring the changes – what are you looking for?



Ways to measure changes

Social media polls and listening	Feedback (print and online)	Online surveys
Evaluation diaries	Interviews (phone, Skype, face-to-face)	Focus groups / workshops
Membership / alumni / friends annual surveys	Media monitoring	National trends and datasets

Measuring the beginning, middle & end

- Measure things at different times and combine qualitative and quantitative data.
- At the **beginning** – baseline numbers + polls, surveys, case studies, focus groups to measure starting knowledge, attitudes and behaviours.
- **During** communications – web stats, social media analytics, direct responses, media reach, publications distributed, etc.
- **After** – measure what has changed – numbers + polls, surveys, case studies, focus groups to measure finishing knowledge, attitudes and behaviours.
- Make changes if things aren't working.
- Don't get too overwhelmed!

Tools that help monitoring and evaluation



Looking outside your charity

- Some organisations need a wider setting – e.g. research, funders, infrastructure, membership, NGOs etc.
- Literature review – reports on similar projects.
- Academic research and evidence – Google Scholar.
- nfpSynergy regular reports on causes and donor behaviours
- National databases – www.statistics.gov.uk, www.neighbourhood.statistics.gov.uk, www.ons.gov.uk
- Databases relevant to cause – e.g:
 - Domestic violence www.womensaid.org.uk
 - Crime www.crime-statistics.co.uk

Evaluation report tips

- Did communications activities help achieve organisational objectives?
- Can communications activities be linked to organisational outcomes?
- What has worked well? Why?
- What did not work well? Why?
- What lessons to learn for future planning?
- Don't forget – tell stakeholders what you have learnt!

Case study: evaluating newsletters and e-marketing

- **Challenges:**
 - Spawning newsletters
 - Everyone sending HTML newsletters
 - Sometimes more than one a day
 - No joined up planning
 - Website content out of sync
- Mailchimp account falling over!

Evaluating e-newsletters and marketing

THE READING AGENCY March 2015 newsletter
Because everything changes when we read

Hello Natasha,

At The Reading Agency our vision is for a world where everyone is a confident and enthusiastic reader. Because everything changes when we read.

We've spent 2014/15 developing our business plan and reviewing our mission, to increase our scale and impact at a time when 1 in 4 children cannot read well by the time they leave primary school and 35% of the adult population don't read for pleasure.

Our new mission outlines what we want all our work to achieve. We want to create and deliver innovative reading opportunities designed to **inspire** more people to read more, encourage them to **share** their enjoyment of reading with others and **celebrate** the difference that reading makes to all our lives.

We have set ourselves the ambitious target of working with our partners, especially our library partners, to create 12 million reading opportunities by 2018. But this is just the starting point.

Whether you join us as a child taking part in a Chatterbooks group, a Summer Reading Challenge volunteer or an adult learning to love reading again through the Six Book Challenge, we want this to be the start of your Reading Journey with us. We want you to go on to take part in our other programmes and help share your love of reading with others.

Above all we want to continue to make reading fun; something which everyone learns from a very early age and enjoys throughout their lives. Reading for pleasure is a more powerful factor in life achievement than socio-economic background but it is also a lifelong source of inspiration, creativity and enjoyment. So, read more below about how our programmes are supporting people of all ages on their Reading Journey; we are looking forward to working with you to introduce the transformative power of reading to even more people over the next three years and beyond.

Sue Wilkinson, MBE
CEO, The Reading Agency

Like on Facebook
Follow on Twitter
Thank you

World Book Night
23 April 2015

Thank you

To independent parcel carrier Yodel who will be the official delivery partner of World Book Night in 2015, for the third year running.

Your story, her words competition

Available now


Materials to promote the Your Story, Her Words competition with bestseller Amanda Prose, which launches in April.

World Book Night canvas bags and Knotpaper.


Posters to promote the Stonewall Young Writers'

- Good open rates – poor click throughs (Mailchimp).
- A/B split campaign making no difference (Mailchimp).
- Little pull through to websites (website analytics).
- Few sales conversions (Shopify).
- Internal analysis of needs (interviews).

Post-evaluation newsletters





Because everything changes when we read



See Gemma Cairney
in conversation with
The Reading Agency

4 November, 7pm
British Library



#LovetoRead

Dear Natasha,

We are delighted to announce that radio personality, journalist and author Gemma Cairney will lead our annual autumn event this year.


Join us at the British Library on 4 November to see Gemma discuss what reading means to her, the barriers that face people who struggle to read and her activism around young people's mental health.

We are really looking forward to hearing how Gemma's personal reading journey has shaped her life and her career. You can [buy tickets to the event here](#) (£12 for adults, £8 for concessions).

The event will open the #LovetoRead weekend, a culmination of the campaign to celebrate the pleasures of reading that the BBC launched in partnership with all the main reading agencies, charities, libraries and publishers earlier this year. Get involved from 20 October by recommending your favourite book on [Twitter](#) using #LovetoRead.


Sue Wilkinson MBE
CEO, The Reading Agency

We're reading



We've announced the exciting line up of Galaxy Quick Reads for 2017. [Find out more here](#) or [order free packs](#) to promote the books at your organisation.

Reading Hack does #LovetoRead



Reading Hack is celebrating #LovetoRead with events at libraries across the country and special activities for 13-24 year olds. Find out [how to get involved](#)

- Newsletters separated into newsletters, news updates and sales mailings.
- Joined up internal newsletter and website content plan.
- Look at metrics once a month.
- Everything stripped right back – fewer, clearer calls to action.
- = better metrics.
- Need to make internal case for change – much easier when can show people benefits.

Who is doing this well?

Baseline survey of 4,000 people

Evaluation by
academics from
Harvard and Bath

Full Randomised Control Trial
funded by Big Lottery

Resilience Programme For Schools

The Amy Winehouse Foundation Resilience Programme is our groundbreaking drug & alcohol awareness and prevention programme for secondary schools. Evaluated by academics at Harvard University and delivered in partnership with **Addaction**, the programme is currently delivered in more than 40 schools across the UK.

Evaluators
working with
programme staff
to inform
programme
design

App to collect evaluation
data from young people



£4.3m over 5 years
250,000 young people
in
250 schools, 25,000
parents

Who can help?

- Specialist - Charity Evaluation Services, Inspiring Impact (CES and NCVO + others), nfpSynergy and New Philanthropy Capital
- Generalist - CharityComms, Media Trust, Small Charities Coalition, NCVO Knowhow Nonprofit,
- LinkedIn groups
- Network events – Institute of Fundraising regional and SIG meetings, CIM charity events, #CharityMeetup, #NFPTweetup, etc.

To sum up

1. Influence colleagues & work out what's working – and what's not!
2. Strategy > Communications > Data
3. Know who you want to influence – define audiences
4. Decide what to measure – can start small
5. Take a baseline
6. Resources > Activities (doing) > Outputs (can count) > Changes (knowledge, attitude, behaviour) > Vision
7. Measure beginning, middle and end
8. Change things if not working.
9. Report and share!
10. Help is out there

Question time



Staying in touch

- natasha@redpencil.co.uk
- [@Redpencil_](#)
- redpencil.co.uk
- [Facebook/RedPencilSE22](#)