

2017 Celebrating 10 Years of Shaping the Future of Corporate Communication in Norway.

## PR and Corporate Communication Measurement Summit

10./11. November 2016, BI, Oslo



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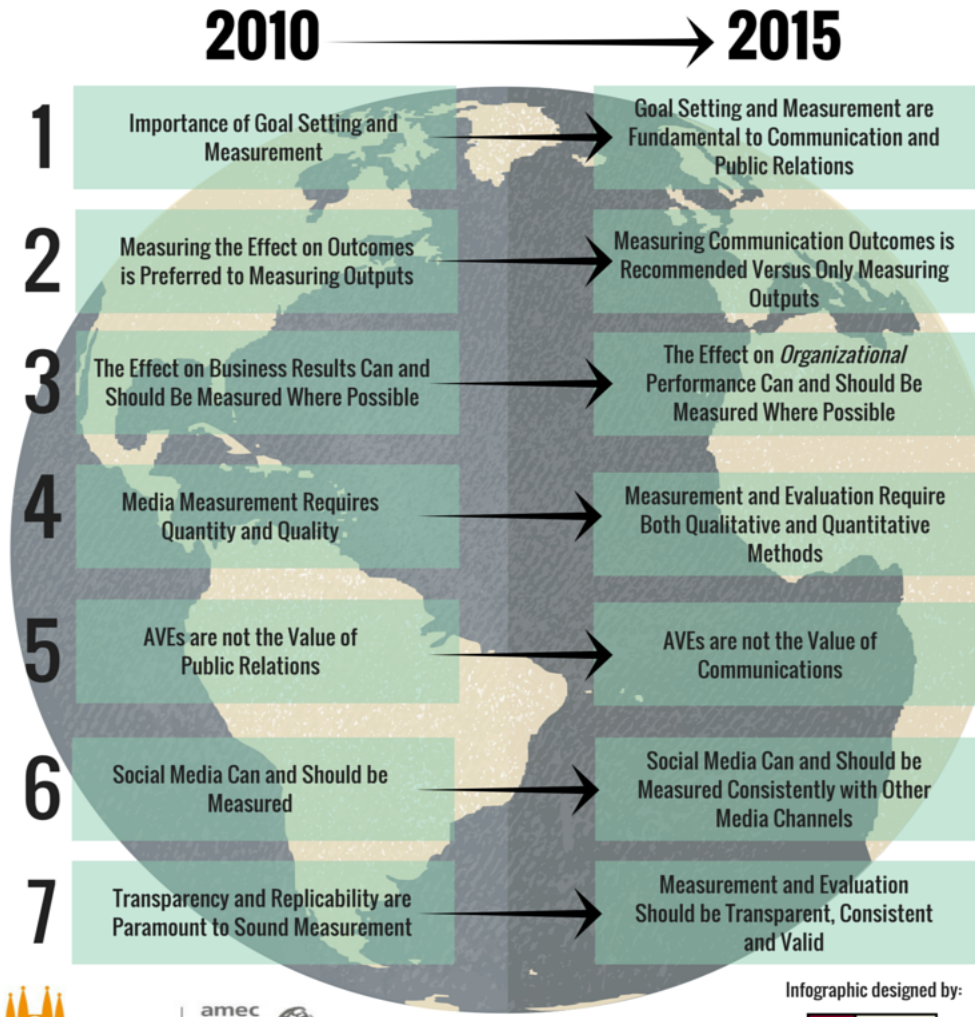
# Latest Developments in Evaluation of Communication Breakthroughs at Last!

**Jim Macnamara** PhD, FAMI, CPM, FAMEC, FPRIA  
Professor of Public Communication, University of Technology Sydney  
Visiting Professor, London School of Economics and Political Science

# This presentation

- Recap some **fundamentals**
  - Key principles
  - The basis of evaluation frameworks and models – where do they come from?
- **New frameworks and models** for evaluation
  - European Commission evaluation framework
  - US Task Force on standards
  - UK Cabinet Office evaluation framework
  - AMEC Integrated Evaluation Framework
  - NSW Government Evaluation Framework
- **A taxonomy** of evaluation – stages, steps, metrics, and methods to **apply in practice**
- **Case studies** – best practice evaluation applied

# BARCELONA PRINCIPLES 2.0



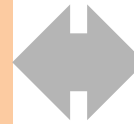
- Goal setting and **measurement** are fundamental for communication and PR
- **Measuring** communication outcomes is recommended versus only measuring outputs
- The effect on organizational performance can and should be **measured** where possible
- Measurement and evaluation require both qualitative and quantitative methods
- AVEs are not the value of communications
- Social media can and should be **measured**
- Measurement and evaluation should be transparent, consistent and valid

# Measurement vs. evaluation



## MEASUREMENT

- The taking of measures
- The collection and analysis of data in relation to a particular object, process, or condition
- SO WHAT?



## EVALUATION

- “Making a **judgement**” about the value or significance of something (Oxford and Merriam-Webster dictionaries)
- Evaluation is the systematic acquisition and **assessment** of information to provide useful **feedback** about some object” (Trochim, 2006, para, 3)
- “The systematic application of **research procedures** to understand the conceptualization, design, implementation, and utility of interventions (Valente, 2001, p. 106)
- Assessing results against **objectives**

## SMART objectives

Specific

- Contain numbers, percentages, dates

Measurable

- Have a measurement plan for each stage

Attainable

- Be realistic

Relevant

- Linked to organisational objectives and goals

Timed

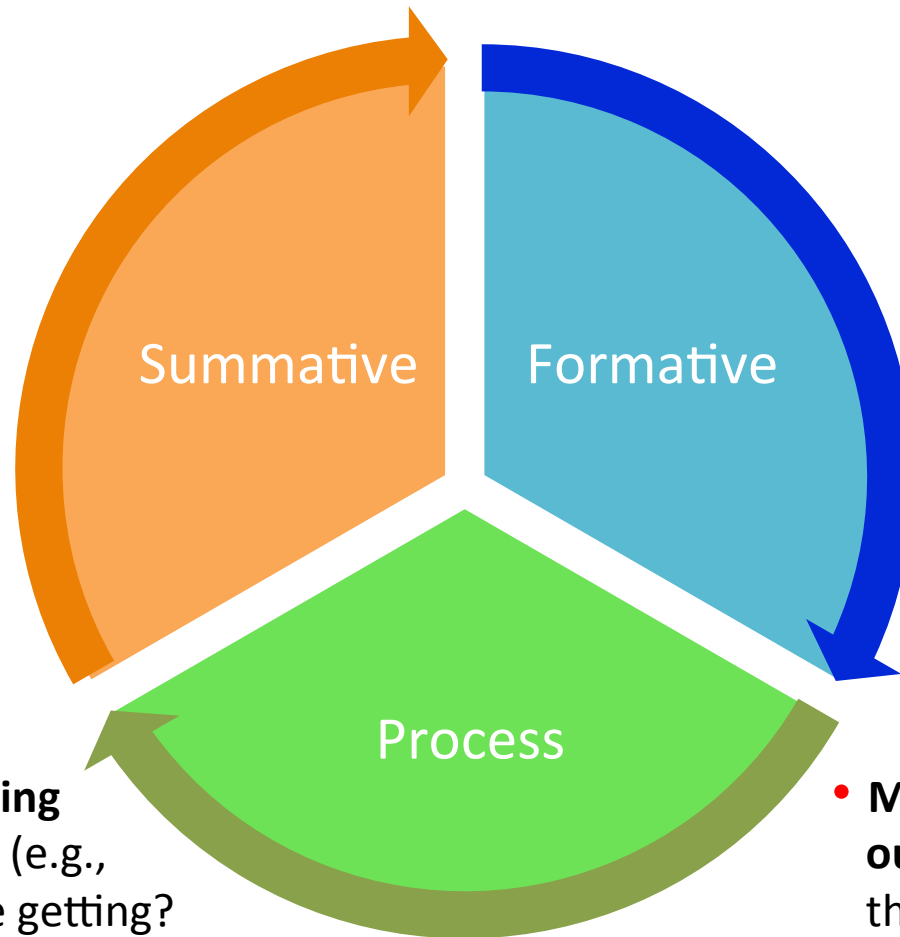
- Achieved by a specific date



# Three types of evaluation

- **Insights / learning** (what has been learned that can inform future strategy, policy, etc?)
- **Impact** (what has happened as a result of the communication?)
- **Outcomes – intermediate and long-term** (what attitude or behaviour change has occurred?)

- **Monitoring and tracking immediate outcomes** (e.g., what response are we getting?)

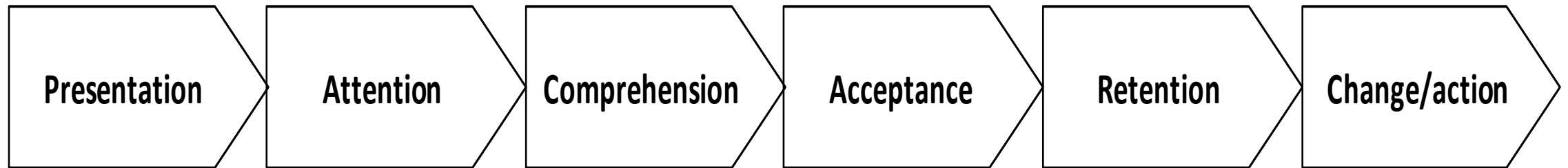


- **Baseline** (e.g., what is the current level of awareness)
- **Precedents** (have other similar programs worked in the past?)
- **Pre-testing** (will what we propose work?)
- **CEA** (is it the most cost-effective approach?)

- **Monitoring and tracking outputs** (e.g., are we reaching the audience?)

# Information processing / communication theory

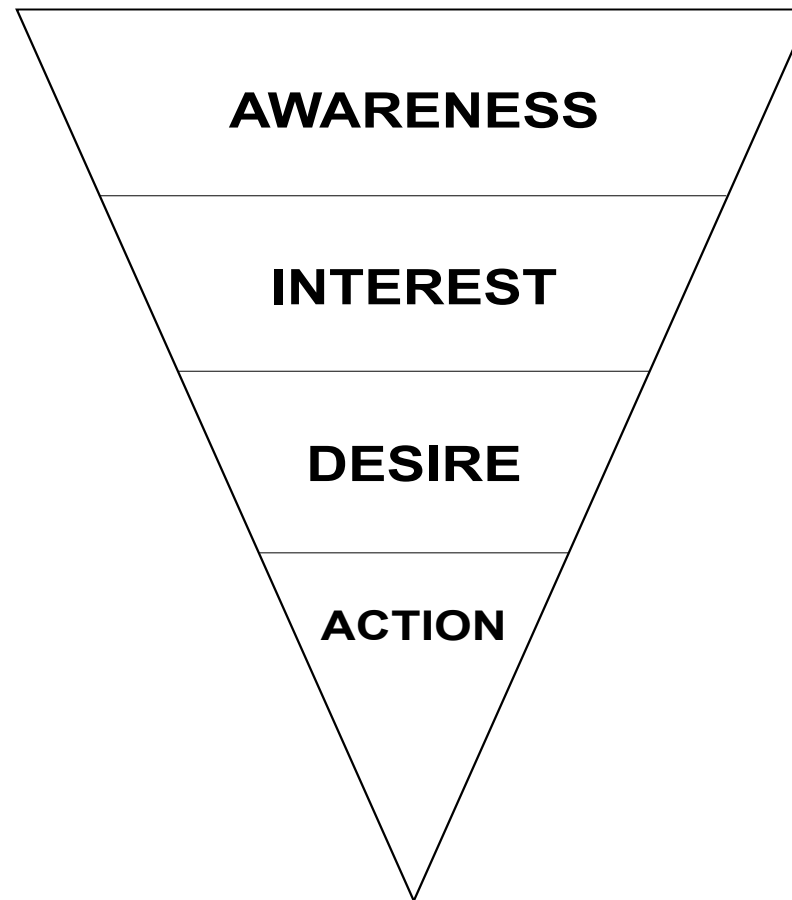
- Six stages of communication (W. J. McGuire, 1968, 1969)





# Advertising models and the 'marketing/sales funnel'

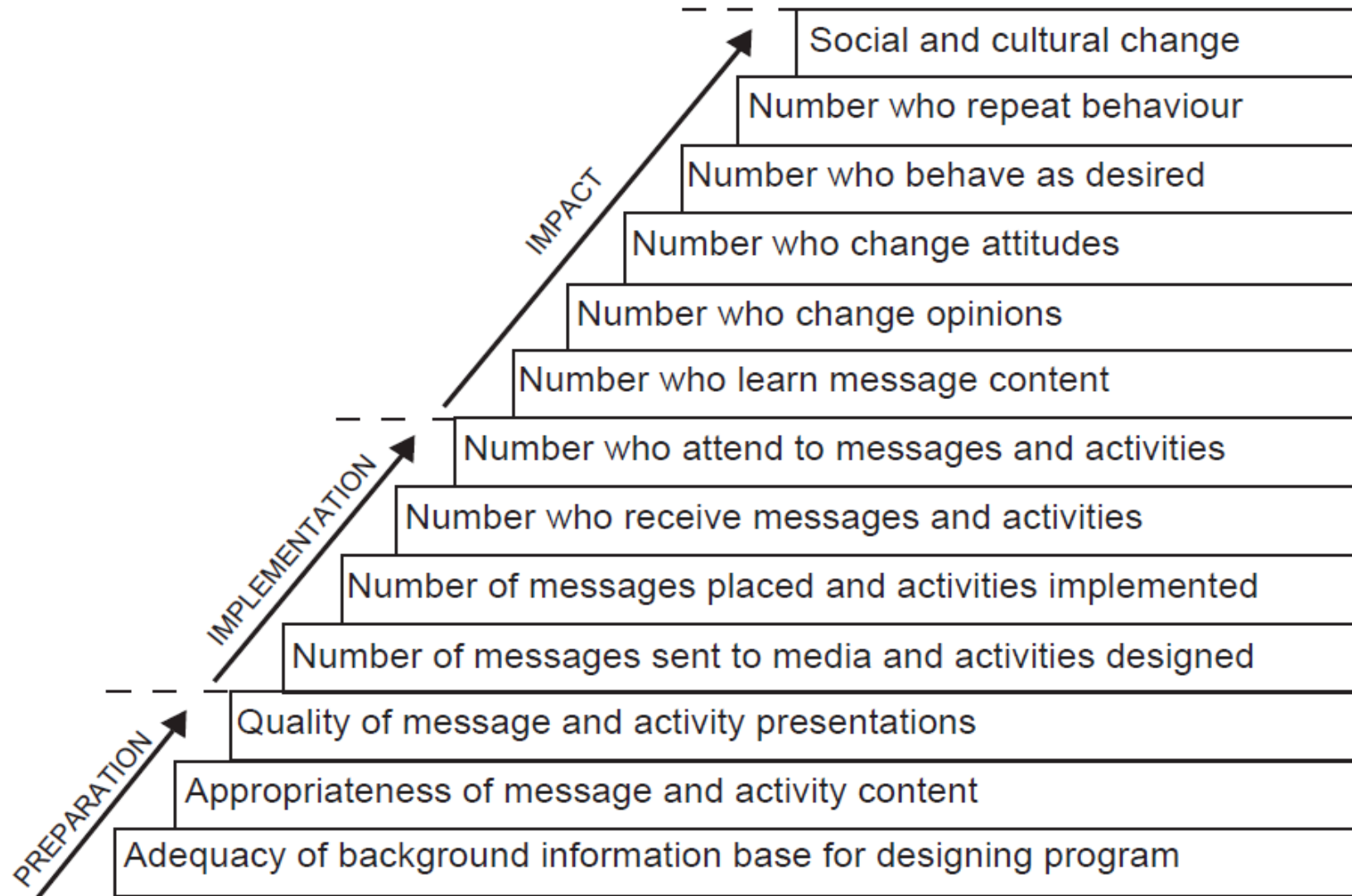
- The AIDA model of advertising  
(Strong, 1925)



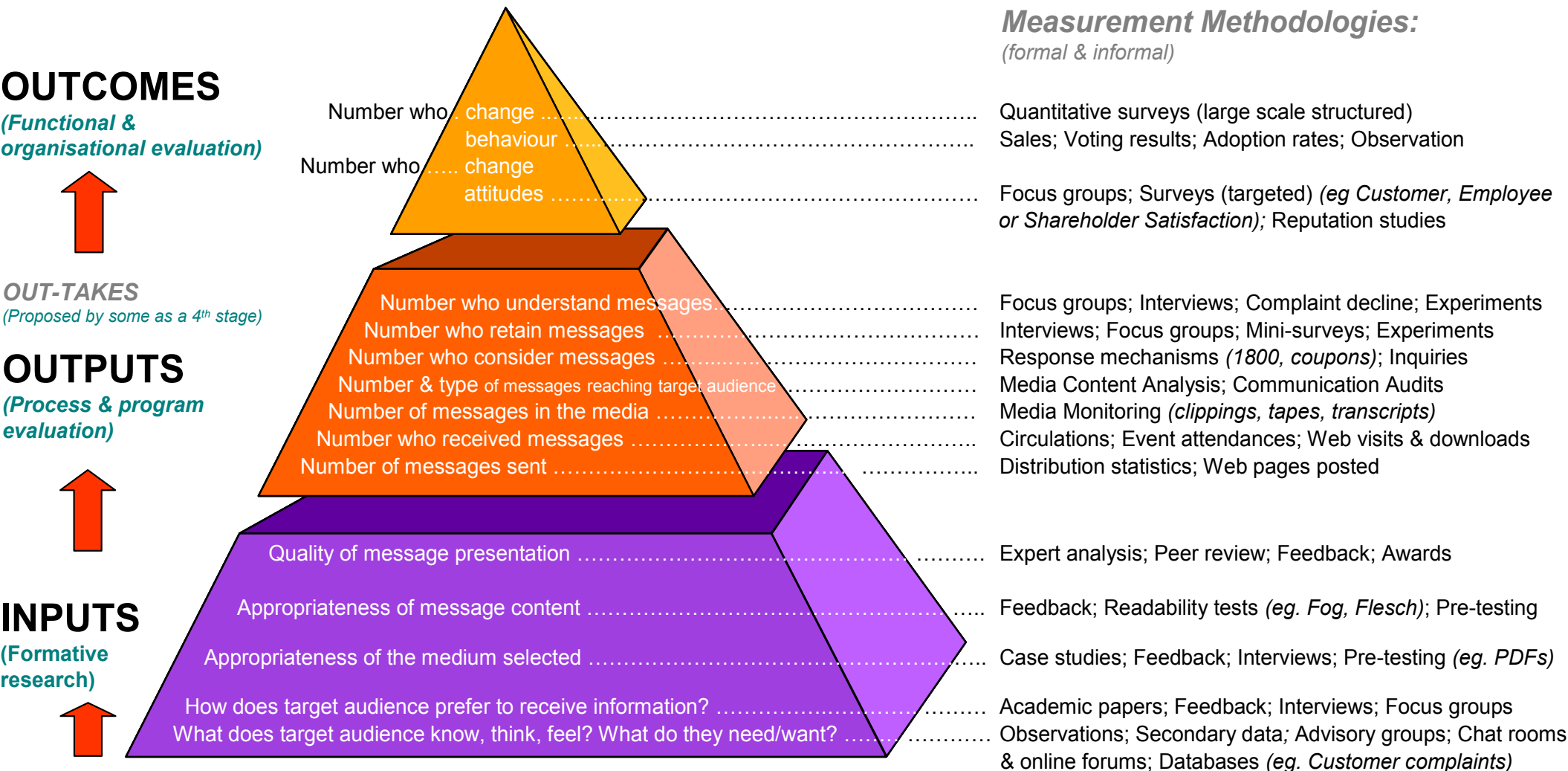
# Information processing / communication

- **Exposure**
- **Attention**
- **Interest** and/or liking
- **Comprehension**
- Cognition, particularly cognitive elaboration (thinking about the message)
- Acquiring skills or knowledge required to deal with the issue (if necessary)
- **Attitude change**, particularly to agreement (what McGuire calls “yielding”)
- Storing information in memory (**retention**)
- Retrieving information (i.e., **recall**)
- Deciding to act in accordance with information (**intention**)
- **Action/behaviour**
- Cognitive integration of behaviour (e.g., reinforcement)
- Encouraging others to behave similarly – what McGuire called “proselytizing” and what is commonly regarded in modern marketing as ‘**advocacy**’ (McGuire, 1999, 2001)

# The PII model of evaluation (Cutlip, Center, & Broom, 1985)

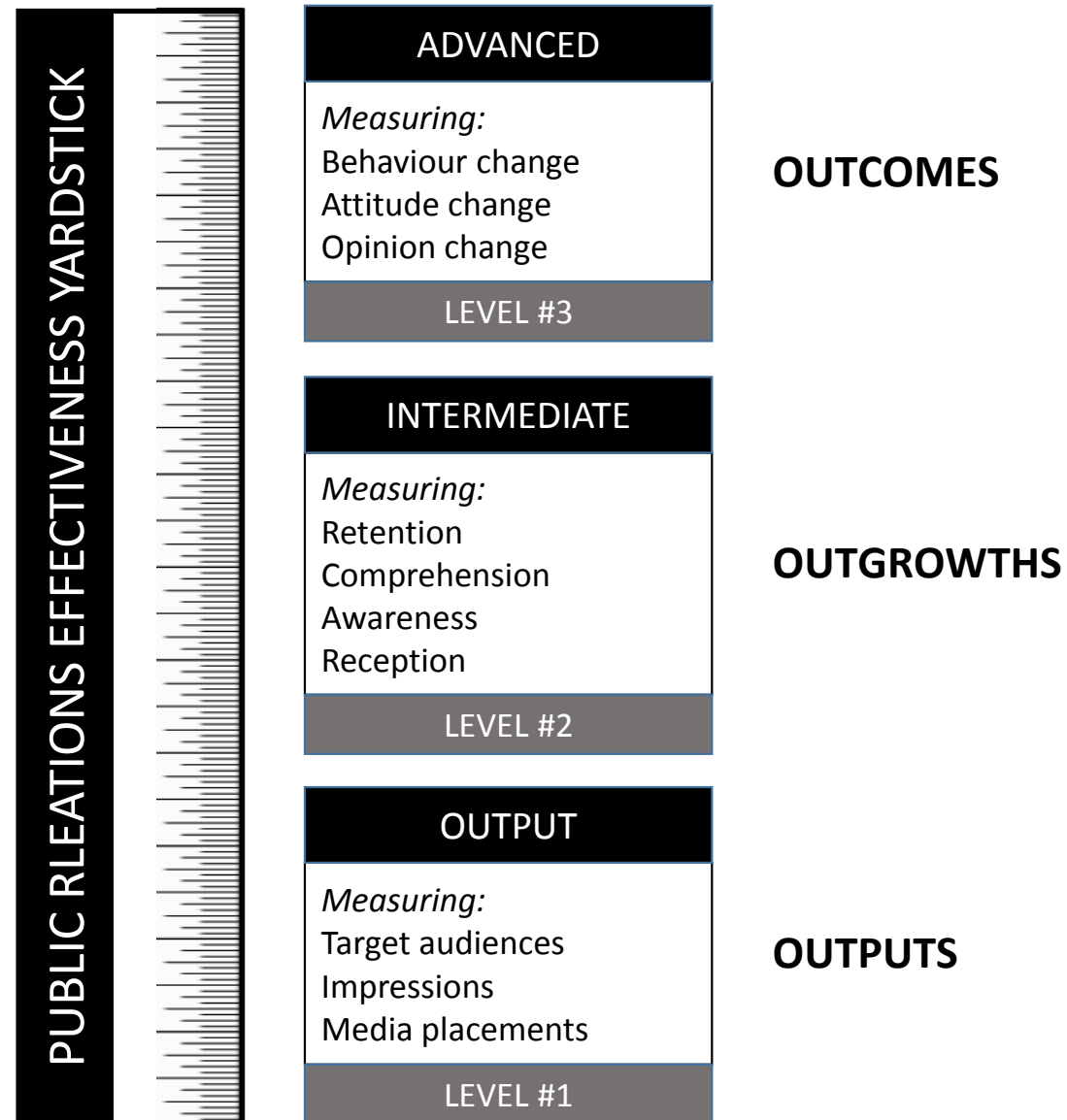


# Pyramid model of PR research (Macnamara, 2002, 2005)

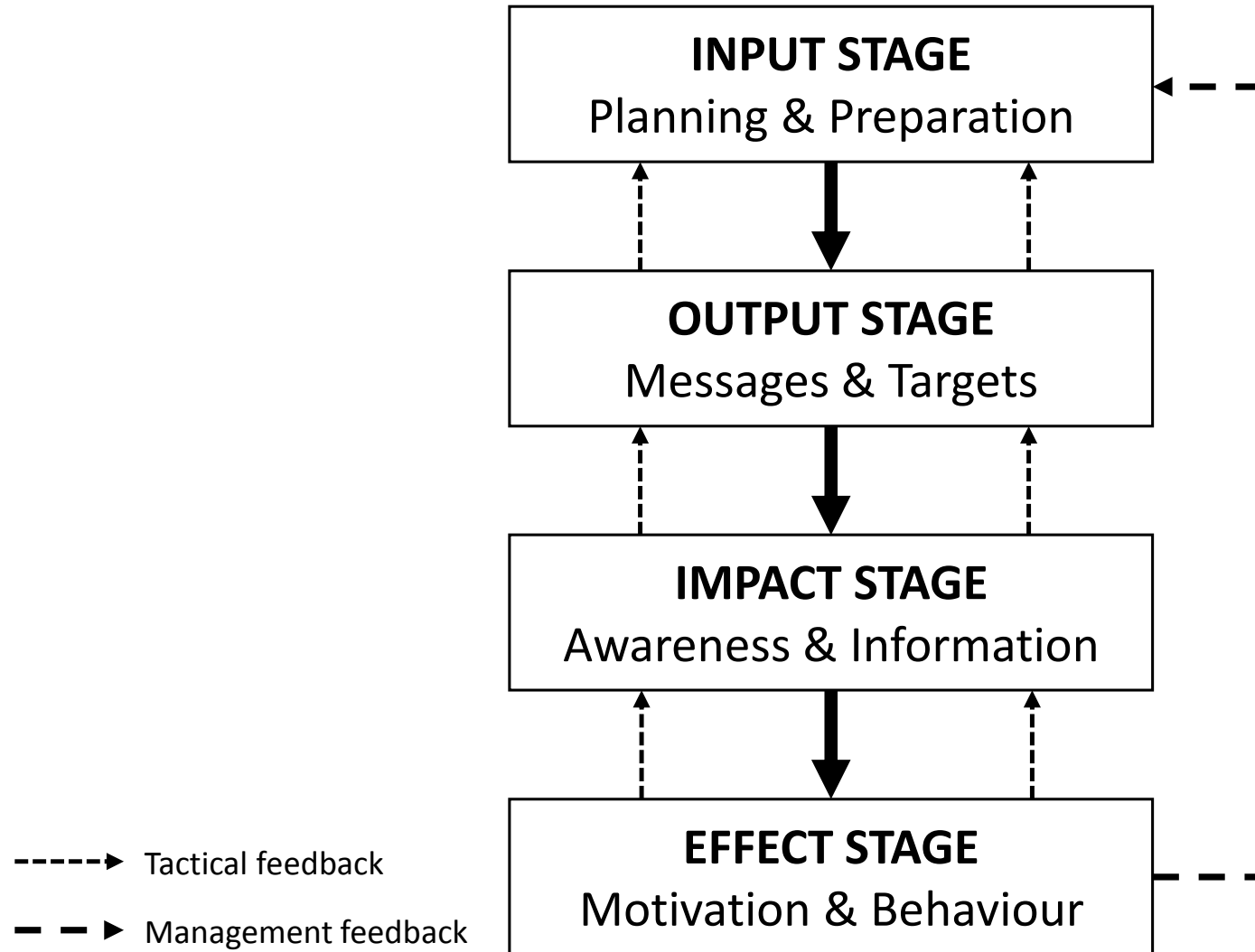


**Key Steps/Stages in Communication:**

# PR effectiveness yardstick (Lindenmann, 1993)

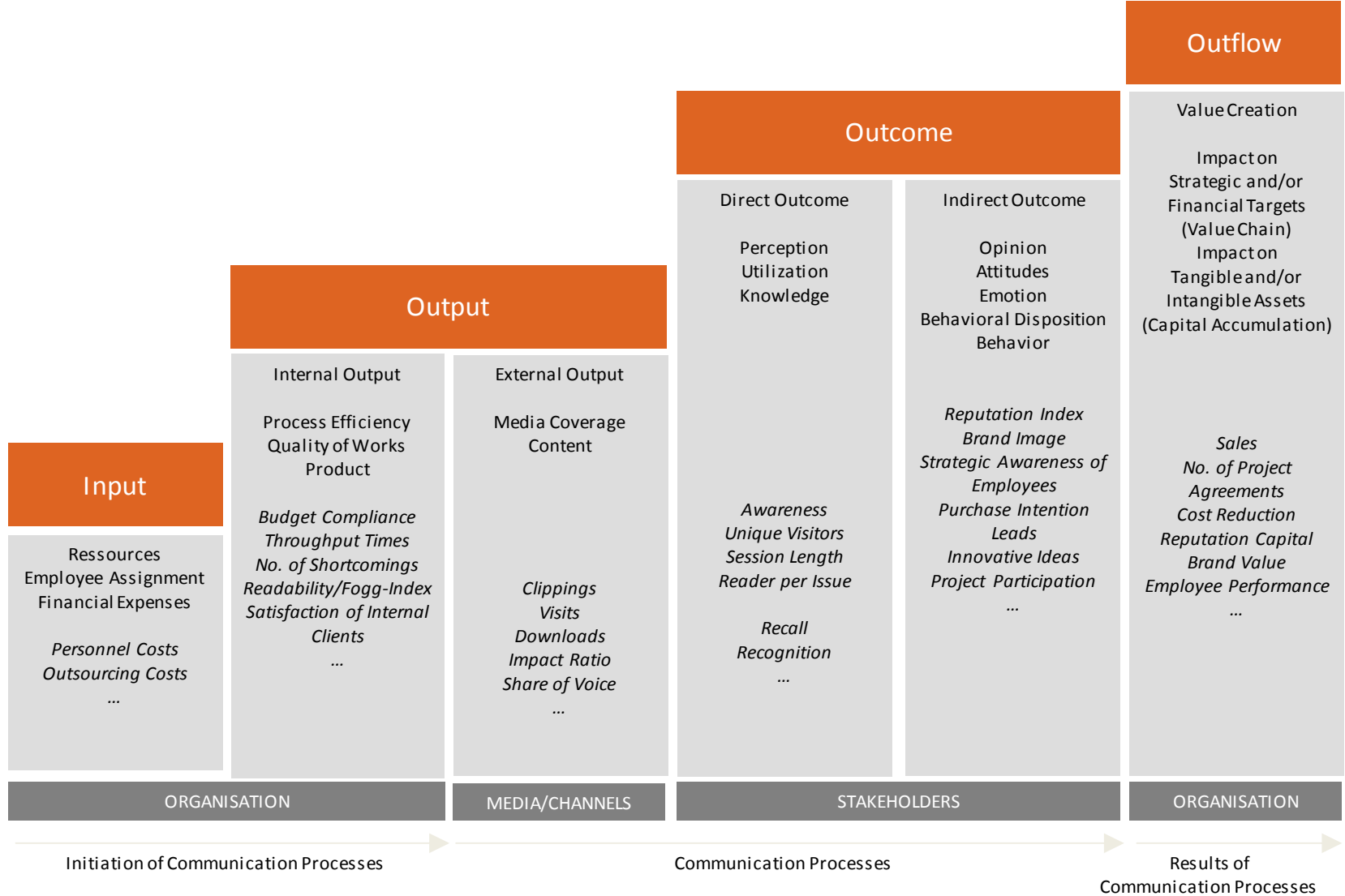


# Noble & Watson's united model (Noble & Watson, 1999)





# Communication controlling (DPRG/GPRA, 2000; DPRG/IPV, 2009)



# European Commission (EC, 2015a)

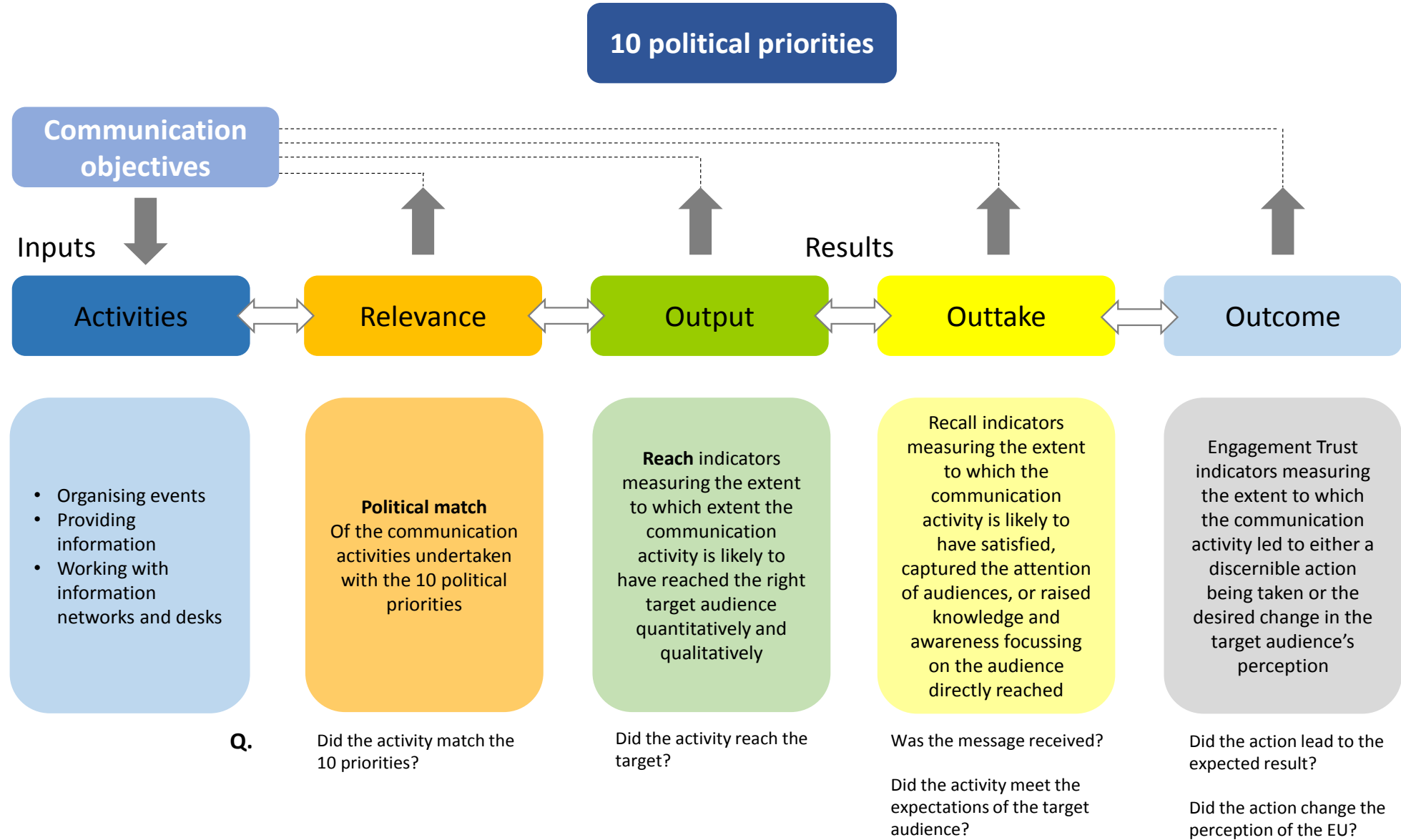
- The European Commission's *Better Regulation Guidelines* uses the terms:
  - Inputs
  - Outputs
  - Results
  - Impact (EC, 2015a)



European Commission



# European Commission evaluation model (EC, 2015b)



# PR evaluation landscape

- Inputs / preparation
- Activities / implementation
- Outputs
- Outtakes
- Outcomes / outflows / outgrowths
- Results / effects / impact





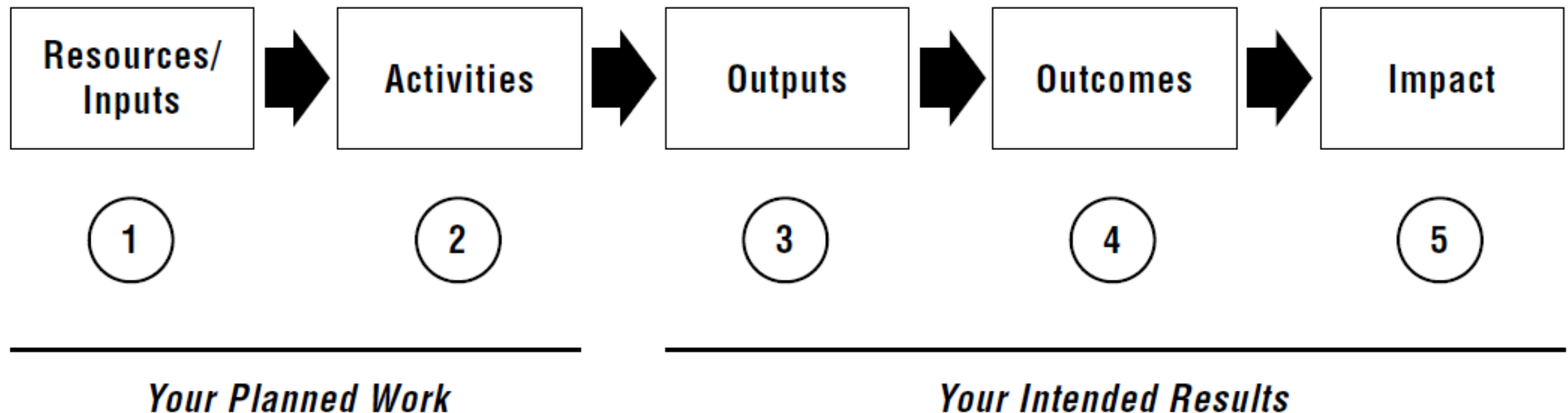
“I couldn’t understand why PR needed to stand apart from the dominant approach to performance alignment and management adopted by the majority of functions one might find in a typical organization”

Philip Sheldrake

[The Measurement Standard](#), December 8, 2015, para. 6

# Program theory and program logic models

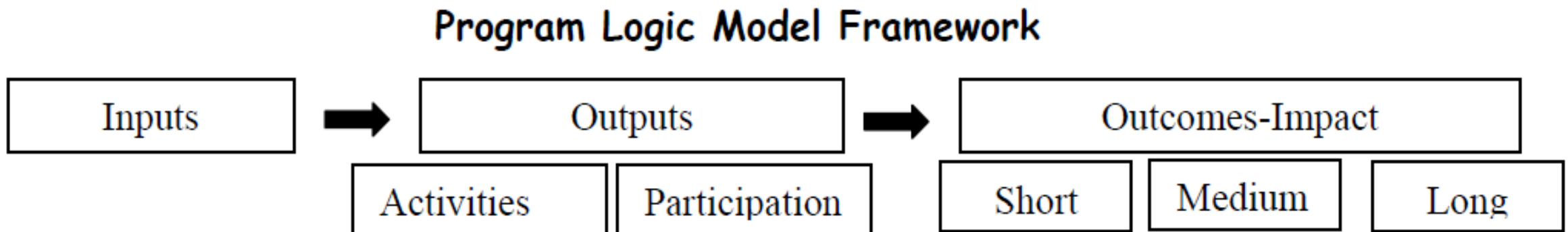
- Basic program model evolved since the 1970s (Kellogg Foundation, 2004, p. 1).





# Program theory and program logic models

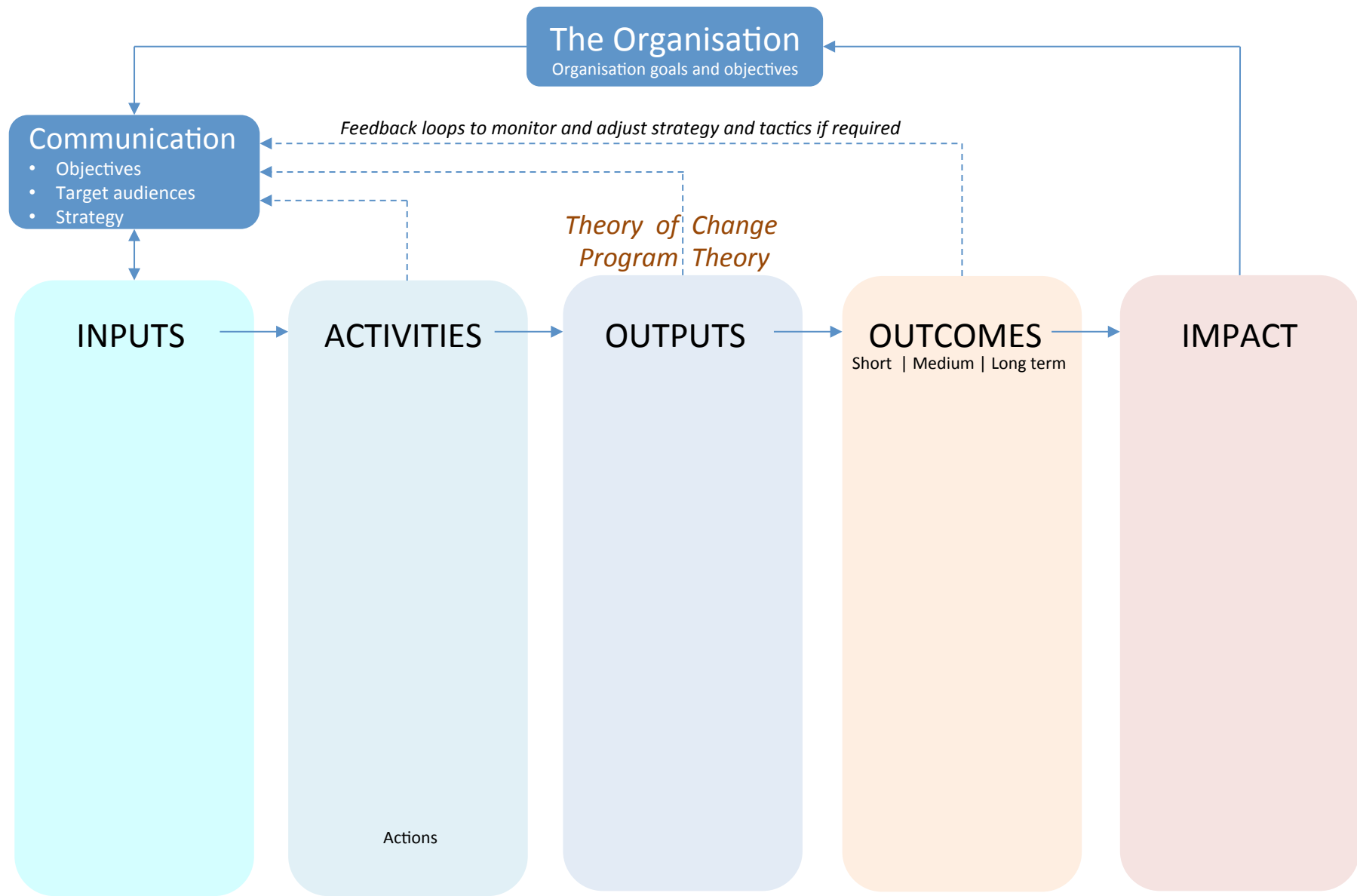
- Program logic model developed by the University of Wisconsin University Cooperative Extension Program (UWEX) (Taylor-Power & Henert, 2008, p. 5)

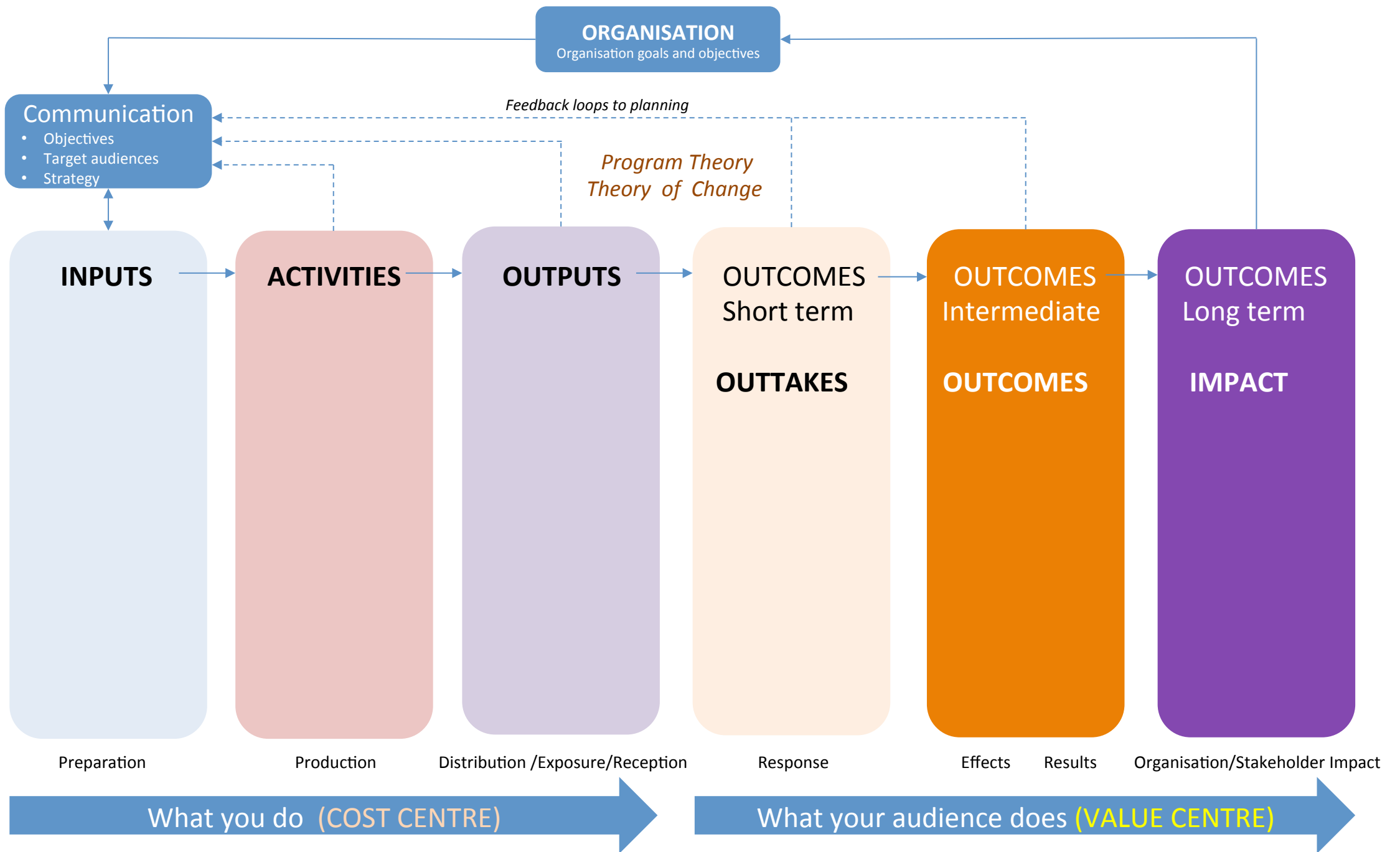


# Program and PR evaluation models (1985–early 2000s)

	Basic program logic model – UWEX (Taylor-Power & Henert, 2008)	Expanded program logic model – UWEX (Taylor-Power & Henert, 2008)	Classic Program Logic Model (e.g., Kellogg Foundation (1998/2004)	Cutlip, Center & Broom (1985) 'PII model'	Macnamara's Macro model' (1992)	Lindenmann's Effectiveness Yardstick (1993, 1997a)	IPRA Gold Paper on Evaluation (1994, pp. 10, 18–19)	Fairchild (1997, 2001); Fairchild & O'Connor, IPR Toolkit (1999)	Lindenmann Standards and Guidelines, 1997b, 1997c)	Noble & Watson's 'Unified Model' (1999)	Grunig & Hon 'relationships' model	DPRG/ GPRA (2000), DPRG/ICV (2009) models	Likely Performance Measurement Framework (2000)	Macnamara's 'Pyramid' model (2000, 2002a, 2002b)	Lindenmann's 'guidelines' (2002/2003)	
<b>Input</b>	Inputs	Inputs	Inputs	Inputs	Inputs	Inputs	Inputs	Inputs (hinted)	Input	Input	Input	Input	Inputs			9
			Activities	Planning												
<b>Output</b>	Outputs <ul style="list-style-type: none"> <li>Activities</li> <li>Participation</li> </ul>	Outputs	Outputs	Implement-ation	Outputs	Outputs (basic)	Outputs	Output	Outputs	Output	Outputs	Output	Outputs	Outputs	PR Outputs	14
								Outtake					Outtakes	Outtakes	PR Outtakes	4
						Outgrowths (inter-mediate)										1
<b>Outcomes</b>	Outcomes <ul style="list-style-type: none"> <li>Short-term</li> <li>Intermediate</li> <li>Long-term</li> </ul>	Outcomes	Outcomes			Outcomes (advanced)	Outcomes	Outcome	Outcomes		Outcomes	Outcome	Outcomes	Outcomes	PR Outcomes	12
		Impact	Impact	Results					Business / organization outcomes	Impact	Relationships	Outflow	Outgrowths		Business / organization outcomes	5
										Effect						1

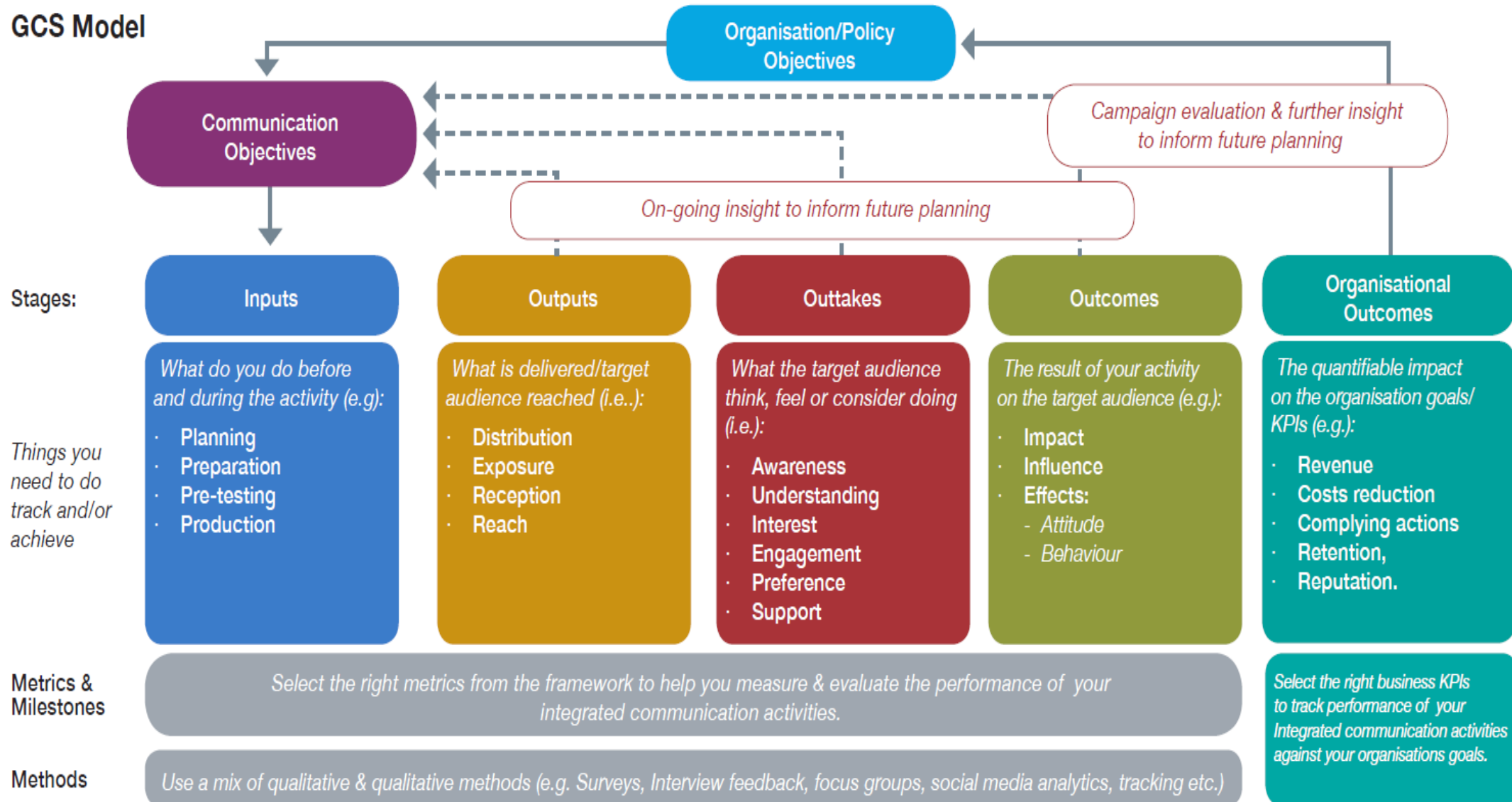
(Macnamara, 2016)





# UK Government Communication Service evaluation framework (GCS, 2015)

## GCS Model



## AMEC Integrated Evaluation Framework (AMEC, 2016)

# INTEGRATED EVALUATION FRAMEWORK

by amec



SUBMIT

Objectives

START HERE

1

Inputs

2

Activity

3

Outputs

4

Out-takes

5

Outcomes

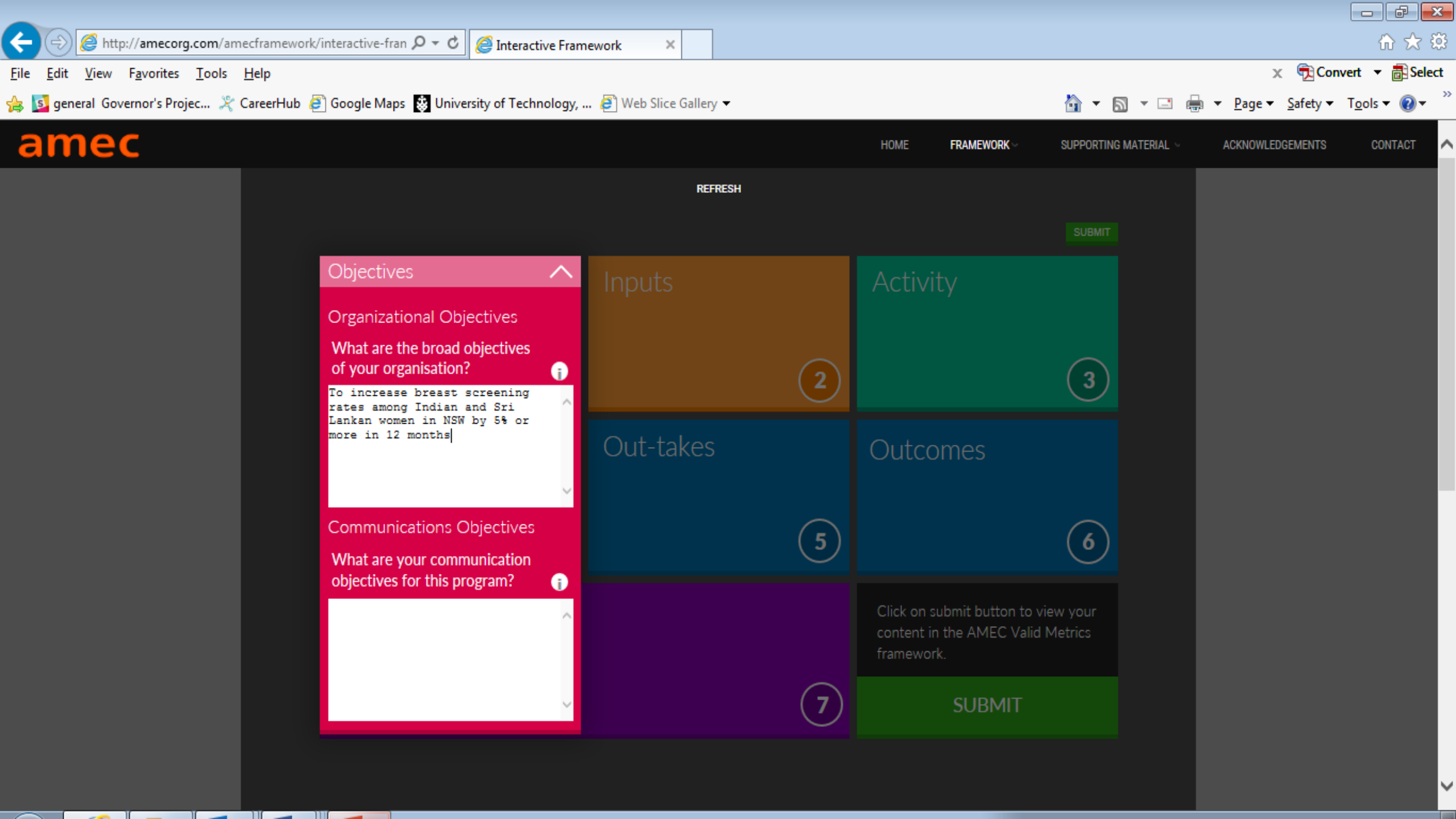
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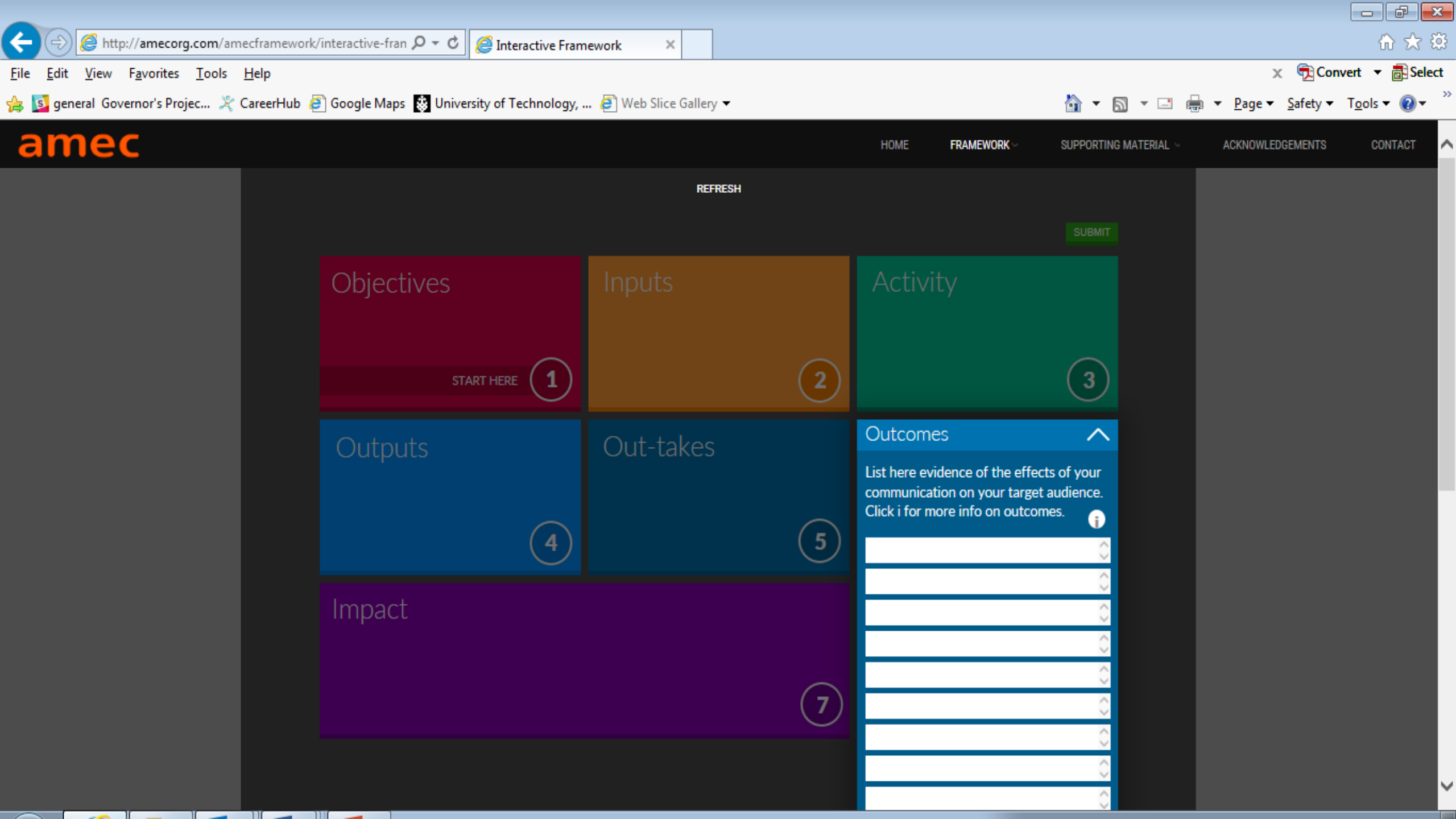
Impact

7

Click on submit button to view your content in the AMEC Valid Metrics framework.

SUBMIT





←

→

http://amecorg.com/amecframework/interactive-fran

Interactive Framework

FileEditViewFavoritesToolsHelp

ConvertSelect

general Governor's Projec...CareerHubGoogle MapsUniversity of Technology, ...Web Slice Gallery

PageSafetyTools?

amec

HOMEFRAMEWORKSUPPORTING MATERIALACKNOWLEDGEMENTSCONTACT

REFRESH

SUBMIT

Objectives

START HERE1

Inputs

2

Activity

3

Outputs

4

Out-takes

5

Outcomes

List here evidence of the effects of your communication on your target audience. Click i for more info on outcomes.

6

Impact

7



PREPARATION	ORGANIZATIONAL OBJECTIVES		COMMUNICATIONS OBJECTIVES		PLAN, SET TARGETS & OTHER INPUTS		
	ORGANIZATIONAL OBJECTIVES		COMMUNICATIONS OBJECTIVES		TARGET AUDIENCE		STRATEGY
	NHSBT encourages people to donate organs, blood, stem cells and tissues and ensures that a safe and adequate supply of blood to hospitals in England and North Wales.		Recruit new blood donors by drawing attention to the need for new volunteers to come forward		General public  18-24 year olds  Black and Asian minority ethnic groups (BAME)		40% reduction in new donors coming forward over the last decade.  Only 5% of Black, Asian and minority ethnic people have given blood in the past year
IMPLEMENTATION	IMPLEMENT	MEASUREMENT & INSIGHTS	MEASURE ACTIVITY	AUDIENCE RESPONSE & EFFECTS		ORGANISATION & STAKEHOLDER EFFECTS	
	ACTIVITY		OUTPUT	OUT-TAKES	OUTCOMES	IMPACT	
	E Working with organisations to remove the letters A, O and B		E Mainstream media coverage doubled from 230 to 459 articles	Rise in social media posts from 8k to 20k	Total registrations increased from 22k to 47k	Total donor registrations exceeded the monthly target of 40k	
	E Press releases on NHSBT research with hard hitting facts		E 97% of articles delivered a key message	12k tweets and retweets of #MissingType hashtag	BAME registrations increased by 151%	Significant correlations between media coverage and donor registrations	
	E Placing spokesperson quotes in press releases for interview		E 62% of coverage featured a spokesperson	11k visitors to campaign website with 17% clicking through to book appointment	Registrations from young adults more than doubled	Social media analysis used to make business case to optimise website for mobile.	
	E Case studies on real life stories of donors and recipients		E 79% of articles featured a call to action			Positive results from experimental regional media tactics	
	E Events targeting ethnic minority groups		E 69% of 18-24 year olds and 73% of ethnic groups reached				

## OUTPUT

- E Mainstream media coverage doubled from 230 to 459 articles
- E 97% of articles delivered a key message
- E 62% of coverage featured a spokesperson
- E 79% of articles featured a call to action
- E 69% of 18-24 year olds and 73% of ethnic groups reached

## OUT-TAKES

Rise in social media posts from 8k to 20k

12k tweets and retweets of #MissingType hashtag

11k visitors to campaign website with 17% clicking through to book appointment

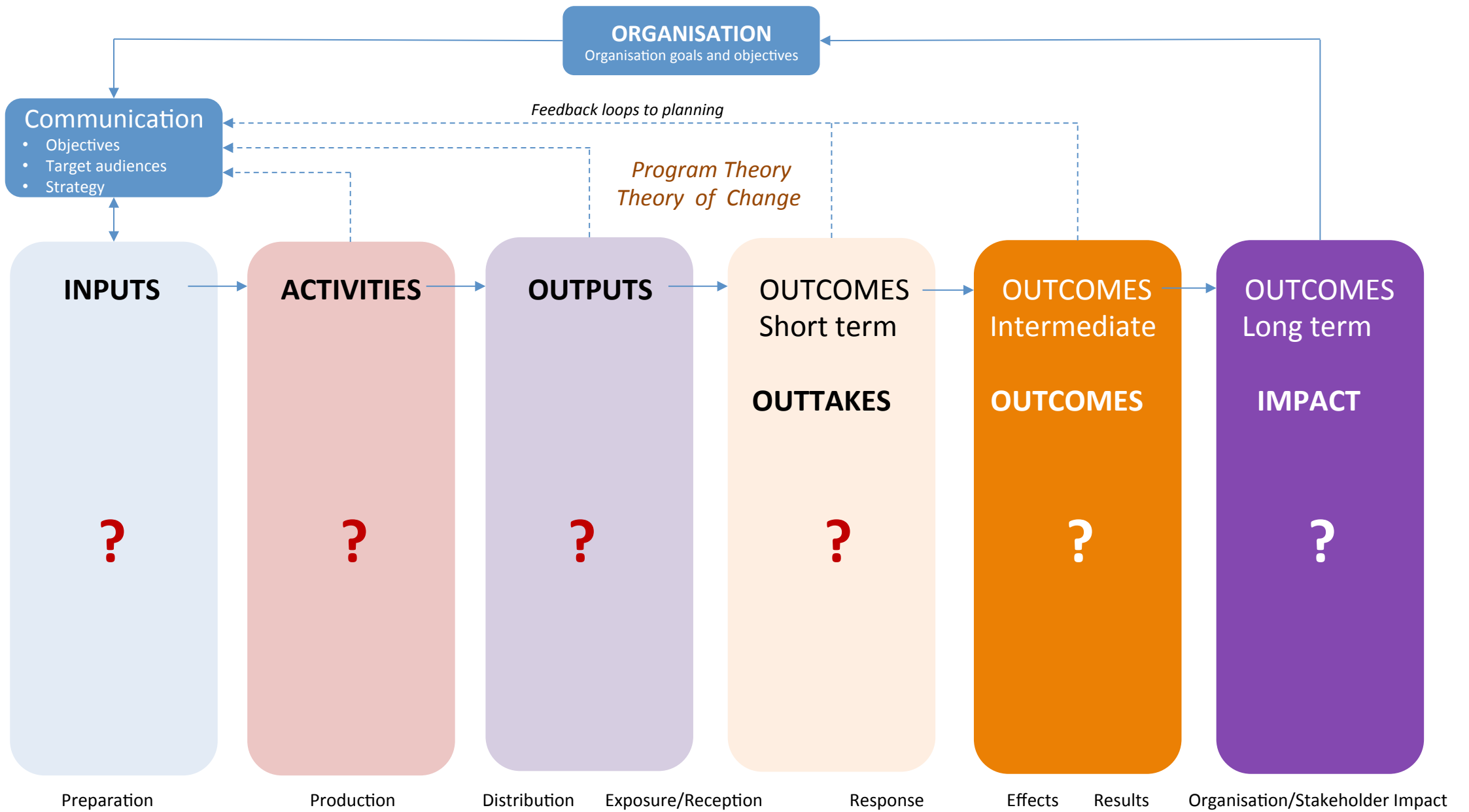
## OUTCOMES

Total registrations increased from 22k to 47k

BAME registrations increased by 151%

Registrations from young adults more than doubled



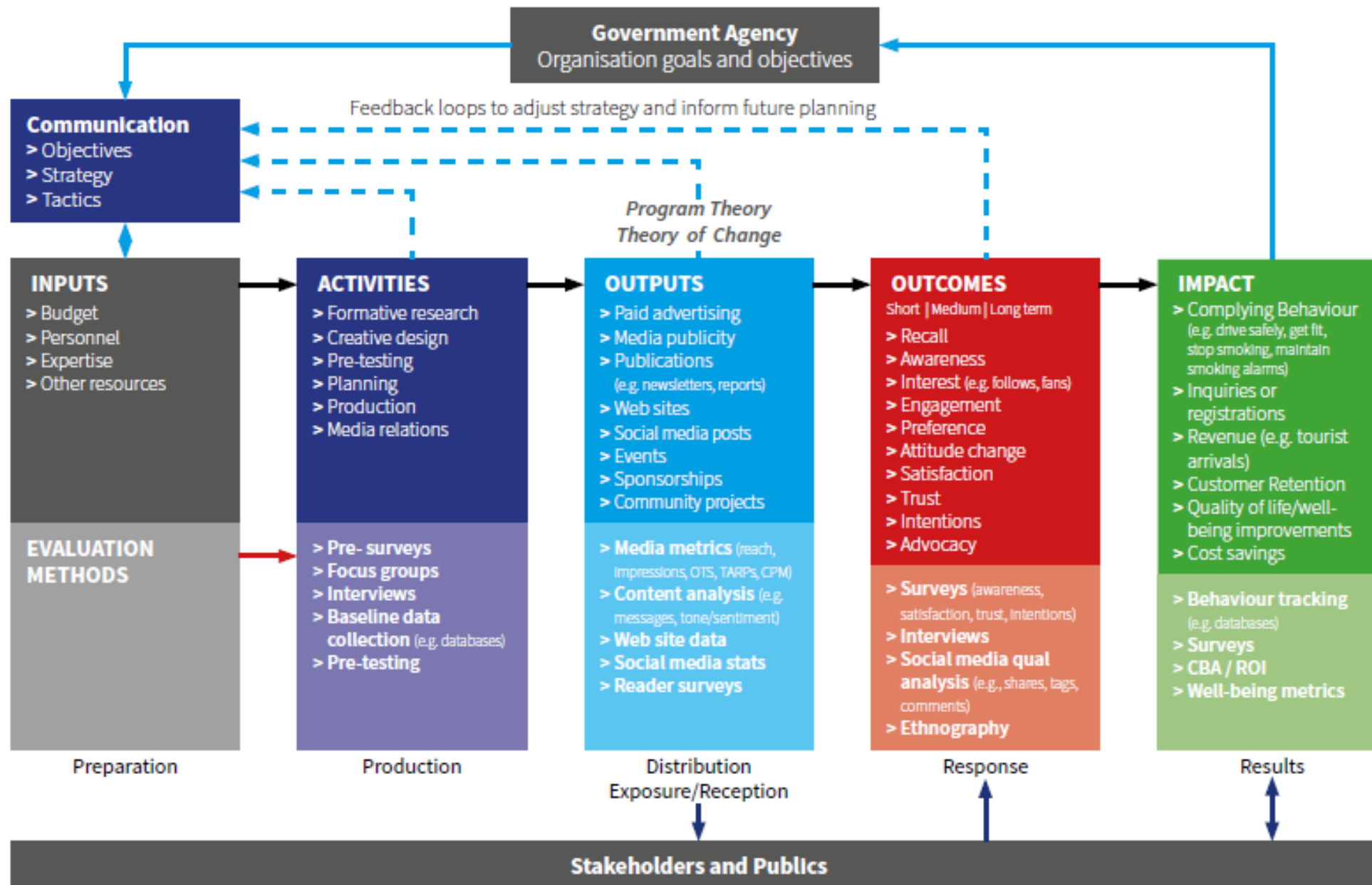


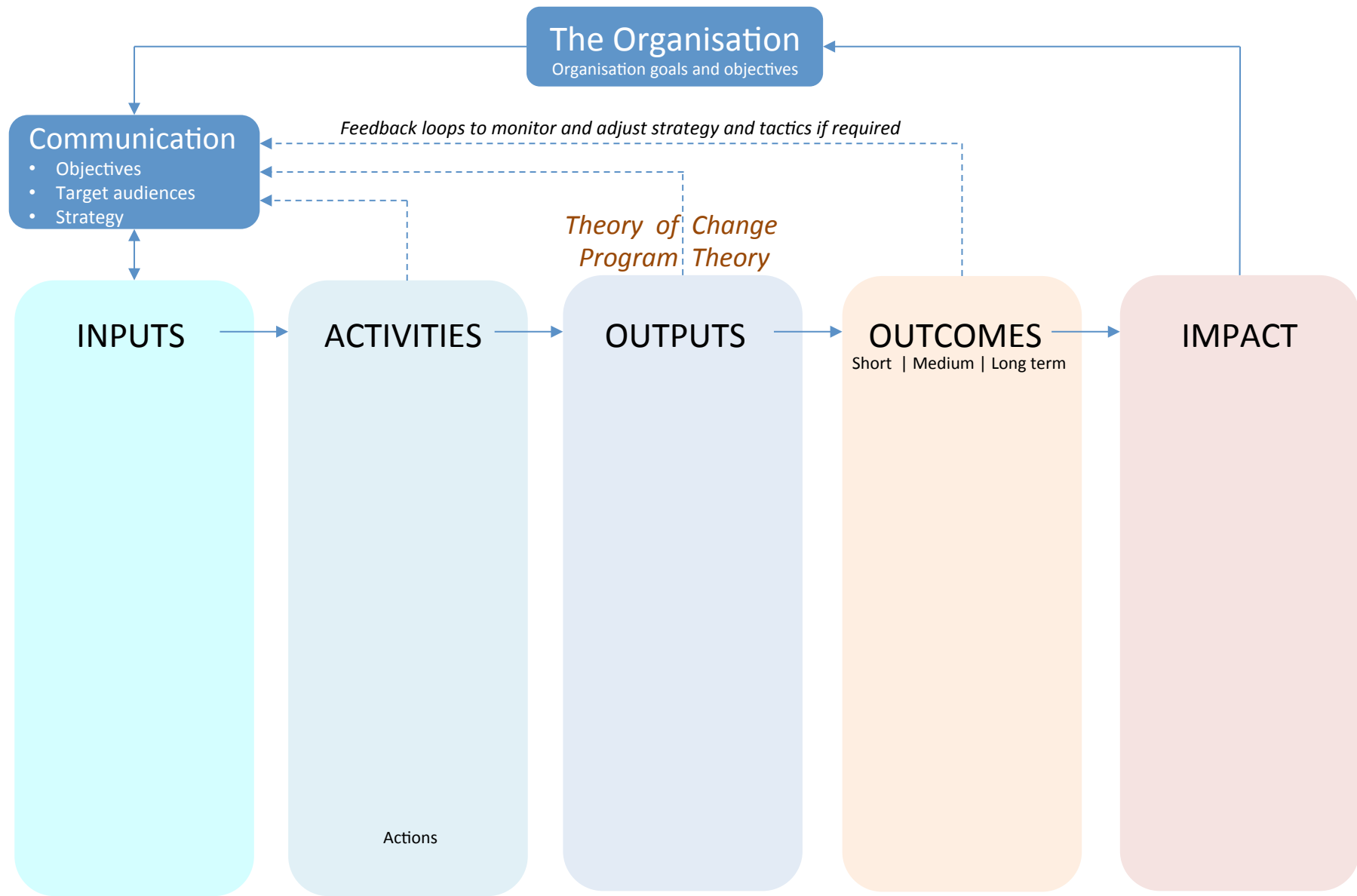
# Taxonomy of evaluation – 6-stage model

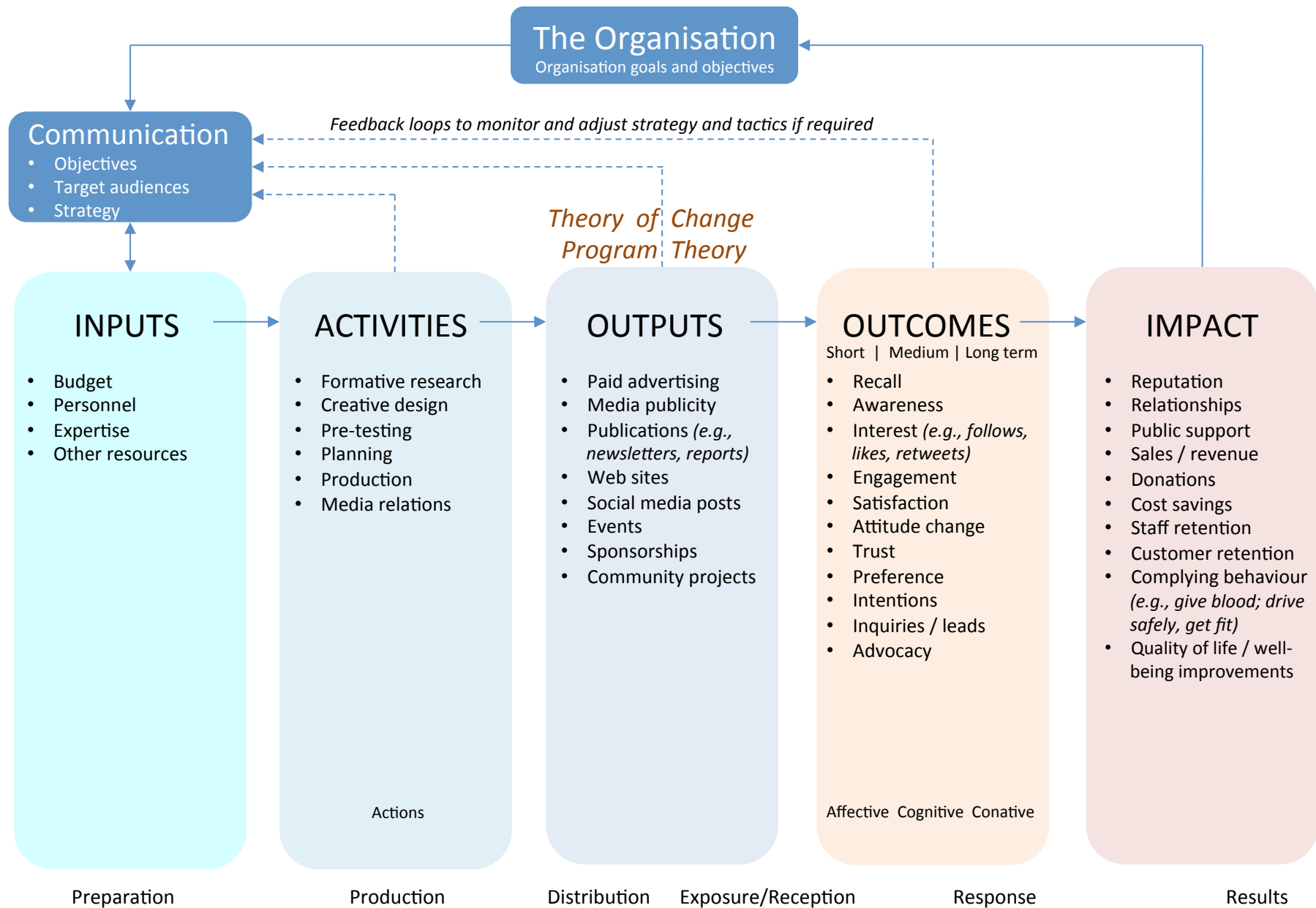
STAGES <i>Macro-level</i>	INPUTS <sup>1</sup>	ACTIVITIES	OUTPUTS	OUTTAKES <sup>2</sup> Short-term outcomes	OUTCOMES <sup>3</sup> Intermediate	IMPACT <sup>4</sup> Long-term
Short definition	<i>What you need in preparation for communication</i>	<i>Things you do to plan and produce your communication</i>	<i>What you put out that is received by target audiences</i>	<i>What audiences do with and take out of your communication</i>	<i>Effects that your communication has on audiences</i>	<i>The results that are caused, in full or in part, by your communication<sup>5</sup></i>
KEY STEPS <i>Meso-level</i>	<ul style="list-style-type: none"> <li>• Objectives</li> <li>• Budget</li> <li>• Resources (e.g., staff, agencies, facilities, partnerships)</li> </ul>	<ul style="list-style-type: none"> <li>• Formative research</li> <li>• Planning</li> <li>• Production (e.g., design, writing, media buying, media relations, media partnerships, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Distribution</li> <li>• Exposure</li> <li>• Reception</li> </ul>	<ul style="list-style-type: none"> <li>• Attention</li> <li>• Awareness</li> <li>• Understanding</li> <li>• Interest / liking</li> <li>• Engagement</li> <li>• Participation</li> <li>• Consideration</li> </ul>	<ul style="list-style-type: none"> <li>• Learning / knowledge</li> <li>• Attitude change</li> <li>• Satisfaction</li> <li>• Trust</li> <li>• Preference</li> <li>• Intention</li> <li>• Advocacy</li> </ul>	<ul style="list-style-type: none"> <li>• Reputation</li> <li>• Relationships</li> <li>• Compliance / complying actions</li> <li>• Organisation change</li> <li>• Public/social change</li> </ul>
Example METRICS & MILESTONES <i>Micro-level</i>	<ul style="list-style-type: none"> <li>• SMART objectives</li> <li>• Targets / KPIs</li> </ul>	<ul style="list-style-type: none"> <li>• Baselines / benchmarks (e.g., current awareness)</li> <li>• Audience needs, preferences, etc.</li> <li>• Strategic plan</li> <li>• Evaluation plan</li> <li>• Pre-test data (e.g., creative concepts)</li> <li>• Content produced (e.g., media releases, Websites)</li> <li>• Media relations</li> </ul>	<ul style="list-style-type: none"> <li>• Publicity volume</li> <li>• Media reach</li> <li>• Impressions/OTS</li> <li>• Share of voice</li> <li>• Tone/sentiment/favourability</li> <li>• Messages placed</li> <li>• Posts, tweets, etc.</li> <li>• Advertising TARPs</li> <li>• E-marketing volume</li> <li>• CPM</li> <li>• Clickthroughs</li> <li>• Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>• Unique visitors</li> <li>• Views</li> <li>• Response (e.g., follows, likes, tags, shares, retweets)</li> <li>• Return visits/views</li> <li>• Recall (unaided, aided)</li> <li>• Positive comments</li> <li>• Positive response in surveys, etc.</li> <li>• Subscribers (e.g., RSS, newsletters)</li> </ul>	<ul style="list-style-type: none"> <li>• Message acceptance</li> <li>• Trust levels</li> <li>• Statements of support or intent</li> <li>• Inquiries</li> <li>• Leads</li> <li>• Registrations (e.g., organ donor list)</li> <li>• Brand preference</li> <li>• Trialling</li> <li>• Joining</li> </ul>	<ul style="list-style-type: none"> <li>• Public/s support</li> <li>• Meet targets (e.g., blood donations; cancer screening membership, etc.)</li> <li>• Sales increase</li> <li>• Donations increase</li> <li>• Cost savings</li> <li>• Staff retention</li> <li>• Customer retention/loyalty</li> <li>• Quality of life / wellbeing increase</li> </ul>

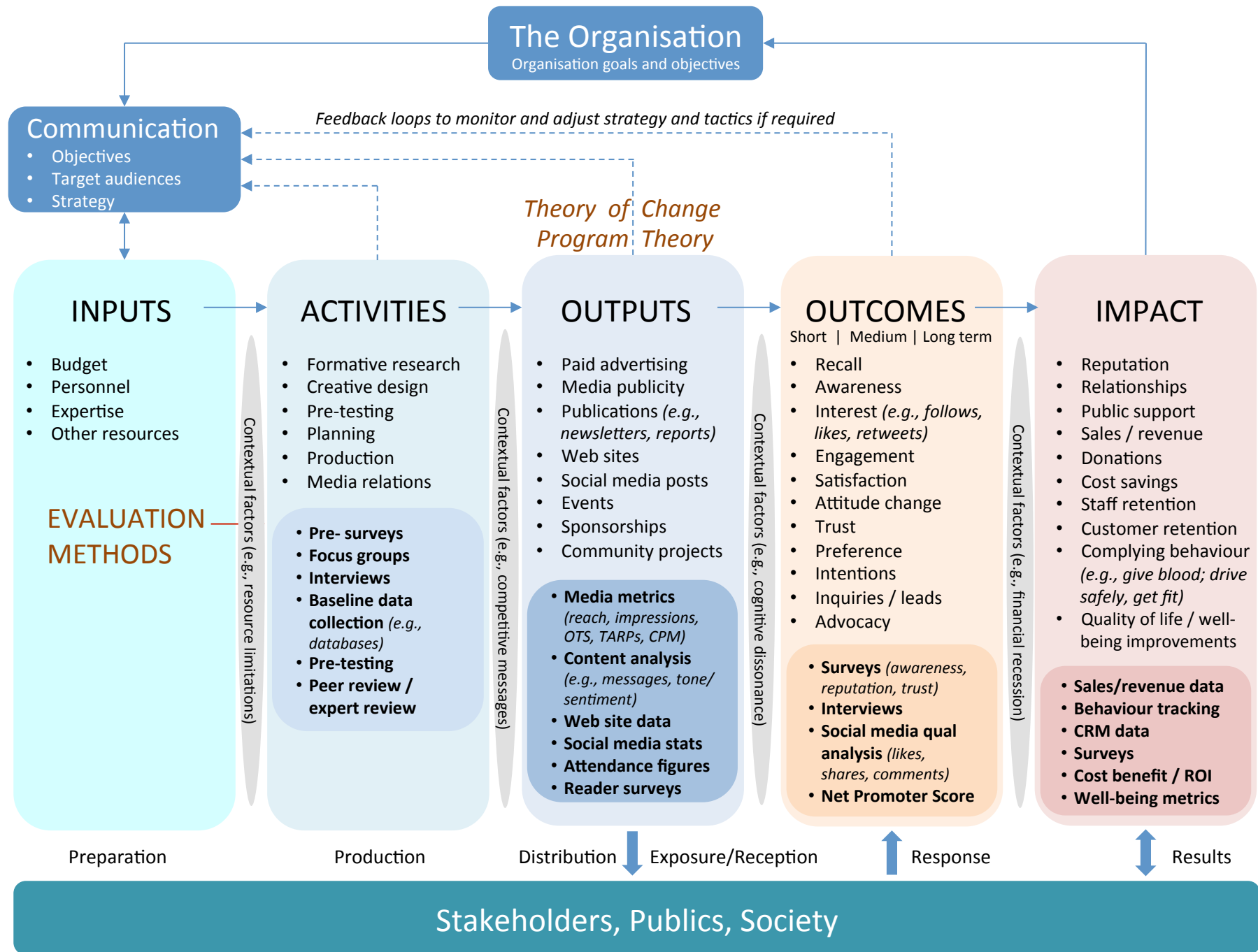
	Inputs	Activities	Outputs	Outtakes	Outcomes	Impact
<b>Example METRICS &amp; MILESTONES</b> <i>Micro-level</i>	<ul style="list-style-type: none"> <li>SMART objectives</li> <li>Targets / KPIs</li> </ul>	<ul style="list-style-type: none"> <li>Baselines / benchmarks (<i>e.g., current awareness</i>)</li> <li>Audience needs, preferences, etc.</li> <li>Strategic plan</li> <li>Evaluation plan</li> <li>Pre-test data (<i>e.g., creative concepts</i>)</li> <li>Content produced (<i>e.g., media releases, Websites</i>)</li> <li>Media relations</li> </ul>	<ul style="list-style-type: none"> <li>Publicity volume</li> <li>Media reach</li> <li>Impressions/OTS</li> <li>Share of voice</li> <li>Tone/sentiment/ favourability</li> <li>Messages placed</li> <li>Posts, tweets, etc.</li> <li>Advertising TARPs</li> <li>E-marketing volume</li> <li>CPM</li> <li>Clickthroughs</li> <li>Event attendance</li> </ul>	<ul style="list-style-type: none"> <li>Unique visitors</li> <li>Views</li> <li>Response (<i>e.g., follows, likes, tags, shares, retweets</i>)</li> <li>Return visits/views</li> <li>Recall (unaided, aided)</li> <li>Positive comments</li> <li>Positive response in surveys, etc.</li> <li>Subscribers (<i>e.g., RSS, newsletters</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Message acceptance</li> <li>Trust levels</li> <li>Statements of support or intent</li> <li>Inquiries</li> <li>Leads</li> <li>Registrations (<i>e.g., organ donor list</i>)</li> <li>Brand preference</li> <li>Trialling</li> <li>Joining</li> </ul>	<ul style="list-style-type: none"> <li>Public/s support</li> <li>Meet targets (<i>e.g., blood donations; cancer screening membership, etc.</i>)</li> <li>Sales increase</li> <li>Donations increase</li> <li>Cost savings</li> <li>Staff retention</li> <li>Customer retention/loyalty</li> <li>Quality of life / wellbeing increase</li> </ul>
<b>METHODS</b> of evaluation	<ul style="list-style-type: none"> <li>Internal analysis</li> <li>Environmental scanning</li> <li>Feasibility analysis</li> <li>Risk analysis</li> </ul>	<ul style="list-style-type: none"> <li>Metadata analysis (<i>e.g., past research and metrics</i>)</li> <li>Market/audience research (<i>e.g., surveys, focus groups, interviews</i>)</li> <li>Stakeholder consultation</li> <li>Case studies (<i>e.g., best practice</i>)</li> <li>SWOT analysis (or PEST, PESTEL, etc.)</li> <li>Pre-testing panels</li> </ul>	<ul style="list-style-type: none"> <li>Media metrics (<i>e.g., audience statistics, impressions, CPM</i>)</li> <li>Media monitoring</li> <li>Media content analysis (<i>quant</i>)</li> <li>Media content analysis (<i>qual</i>)</li> <li>Social media analysis (<i>quant and qual</i>)</li> <li>Activity reports (<i>e.g., events, sponsorships</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Web statistics (<i>e.g., views, downloads</i>)</li> <li>Social media analysis (<i>qual – e.g., comments</i>)</li> <li>Feedback (<i>e.g., comments, letters</i>)</li> <li>Ethnography (<i>observation</i>)</li> <li>Netnography (<i>online ethnography</i>)</li> <li>Audience surveys (<i>e.g., re awareness, understanding, interest, opinion</i>)</li> <li>Focus group (<i>as above</i>)</li> <li>Interviews (<i>as above</i>)</li> </ul>	<ul style="list-style-type: none"> <li>Social media analysis (<i>qual</i>)</li> <li>Database statistics (<i>e.g., inquiry tracking identifying sources</i>)</li> <li>Ethnography (<i>observation</i>)</li> <li>Netnography (<i>online ethnography</i>)</li> <li>Opinion polls</li> <li>Stakeholder surveys (<i>e.g., re satisfaction, trust</i>)</li> <li>Focus groups (<i>as above</i>)</li> <li>Interviews (<i>as above</i>)</li> <li>Net Promoter Score (NPS)</li> </ul>	<ul style="list-style-type: none"> <li>Database records (<i>e.g., blood donations, health outcomes, membership, etc.</i>)</li> <li>Sales tracking</li> <li>Donation tracking</li> <li>CRM data</li> <li>Staff survey data</li> <li>Reputation studies</li> <li>Cost Benefit Analysis/ Benefit Cost Ratio</li> <li>ROI (<i>if there are financial objectives</i>)</li> <li>Econometrics</li> </ul>

# NSW Government Evaluation Framework for Advertising and Communication



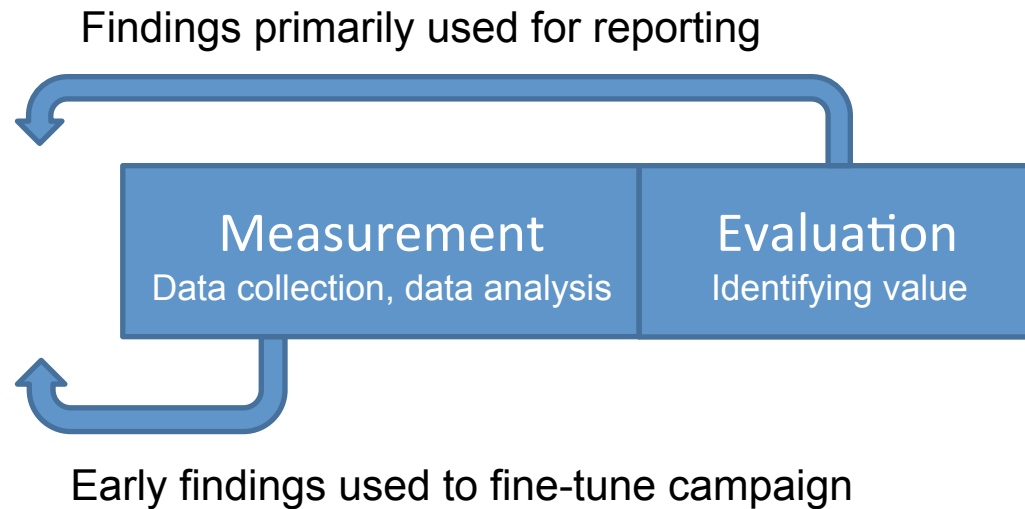






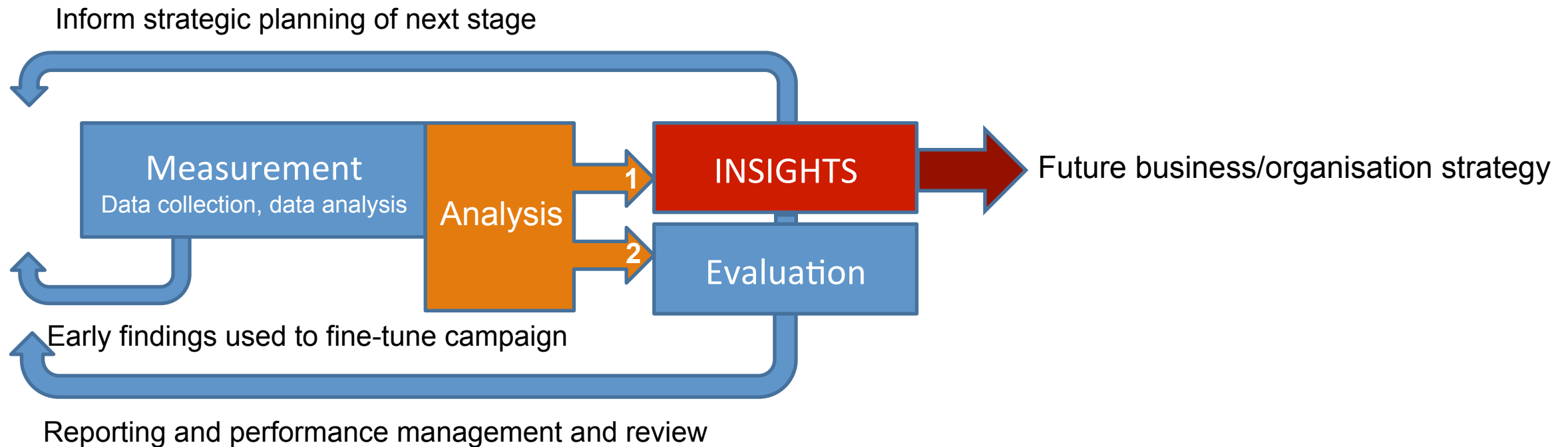


## Measurement and evaluation (traditional model)





## The MAIE Model



# PINK SARI PROJECT

[pinksariproject.org](http://pinksariproject.org)

## Case study: Youth anti-cannabis campaign





# Questions & Discussion