

ABSTRACT

A lot has been written about the evaluation of public relations (PR) and communications. At one time or another, we have heard that “Communications is the last bastion of the *unmeasurable*.”

At Harley House Consultants Inc. we promote that evaluation is not something done after the fact, but is integrated throughout the communications management process, as communications programs are planned, developed and delivered. Communications products and services can be evaluated by the criteria of effectiveness and efficiency. Communicators should conduct self-evaluations on an ongoing basis, in order to ensure that objective’s are achieved, management’s message is successfully delivered, and that audience needs are effectively met. Communicators should also be subject to normal external reviews.

Harley House Consultants Inc. recently developed a training course on behalf of the federal government on evaluating communications products, services, programs and initiatives against planned objectives and professional standards. This training course forms the basis of this paper. *Evaluation Methods and Techniques for Government of Canada Communicators* is an introductory course designed to assist in evaluating communications products, services, programs and initiatives against planned objectives and professional standards. The course has been tailored to the specific information needs of the Government of Canada communicators.

For more information about the course please contact:

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INTRODUCTION

The *Government Communications Policy* recognizes that good communications is fundamental to the achievement of government objectives, and that communications planning, coordination and execution are an integral part of the management process of government. In order to ensure “good communications”, the Policy acknowledges the importance of monitoring and evaluating the effectiveness of communications activities. Communications evaluation helps ensure that the public receives information about government policies, programs and services, and that the concerns and interests of the public are taken into account in the formulation and implementation of government policies and programs.

The *Government Communications Policy* states that Institutions are responsible for integrating communications into the corporate management process and must ... “monitor and evaluate the effectiveness of communications activities in relation to the objectives stated in communications plans”.

The Treasury Board of Canada Comptroller General document *Evaluating Departmental Communications/Information Programs* states that the need to evaluate communications activities and programs reflects a number of factors: the all-pervasive nature of communications activity in government departments; the large amount of expenditures allocated to this activity; the priority attached to the planning, execution and review of such activity by Cabinet; and, the importance of communications activity to the success of many government programs.

Communications Evaluation involves tracking the impact and effect of communications activities as they are being planned, developed and delivered. Determining whether adjustments should be made to existing communications is a compelling reason to evaluate communications activities while they are in progress.

When evaluating communications there are three levels of measurement. These include:

- Measuring Output;
- Measuring Out-take; and
- Measuring Outcome

Measuring Output - Measuring production of output of the Communications effort in order to assess whether the message was aimed at and sent to the target audience. Techniques employed involve analysing media coverage including number of articles and interviews (perhaps compared with the number of releases issued), prominence and messages. Other outputs might be to measure speed of uptake of literature against what was planned, or to assess the size and characteristics of the audience being reached, the number visiting an event, or the number of hits on a website.

Measuring Out-take - Measuring the degree to which the audience is aware of the message,

retained and understood it. Techniques include interviews among target audiences - for instance, pre- and post campaign stages - qualitative research and one-on-one in-depth interviews to assess reaction to a programme and future intentions.

Measuring Outcome - Measuring the degree to which the program is actually changing people's opinions, attitudes and behaviour: did they stop smoking, join an organization or start wearing seat belts?

Techniques include detailed interviewing and focus groups among target audiences, research among representative samples of media and other opinion leaders or simply observation of people's behaviour. Other "outcomes" would be straightforward proof - by how much enquiries increased, products/publications sold or support rose. It is necessary to monitor but not research these obvious results.

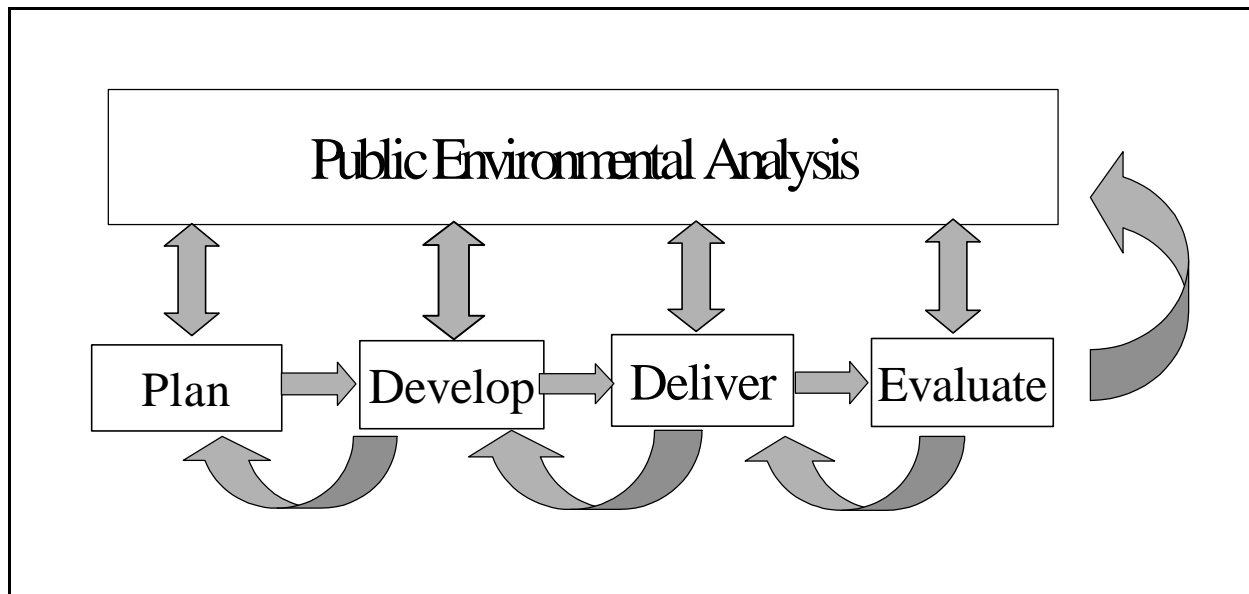
Benchmark research is a pre-requisite to determine whether and to what extent attitudes or behaviour have altered (Outcome) in line with objectives.

ON-GOING EVALUATION

One of the major objectives of evaluating communications activities is to improve their effectiveness. This cannot be accomplished after the fact; it must be carried out throughout the communications management process. The benefits of evaluating communications throughout the process are:

- the end impact is likely to be more effective
- proper planning, development and delivery are ensured
- it is possible to quickly determine the impact of the communications effort on the target audience and adjust the communications effort during delivery to maximize its effectiveness
- it provides an ongoing management control framework that leads to more effective decision making as well as more effective and efficient development and delivery of communications programs.

The model on the following page provides an overview of the communications management process.



Evaluation should be continual throughout the communications management process. In this way, steps can be taken to ensure that the output or strategy is based on solid research and stays on track throughout the planning, development and delivery stages and that adjustments can be made to existing campaigns. Furthermore, going back to assess a campaign once it is complete is more difficult and produces results only for future planning and development.

Evaluation should take place throughout the process to ensure that:

- The communications strategies are based on solid research obtained through the Public Environmental Analysis process;
- The planned communications strategy or component will meet both the organization's objectives and the target audiences' information requirements;
- The communications strategy or component is staying on track as it is being developed;
- The communications strategy or component was delivered to the target audience it was intended to reach; and
- The communications strategy or component achieved what it set out to achieve, in an effective and economical manner.

FIVE-STEP EVALUATION PROCESS

Effective communications can be achieved and maintained by following five simple steps, in an ongoing cycle of public environmental analysis, communications planning, development, delivery and evaluation:

- Step 1. Undertake a Public Environmental Analysis so as to define the issues and opportunities that exist within the various internal and external audiences and benchmark the current situation.
- Step 2. Interpret these issues and opportunities to senior management and formulate a communications plan/strategy that includes SMART (**S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**imely) communications objectives.
- Step 3. Develop a strategic public relations/communications program that integrates policy, objectives, messages and communications techniques, and pretest its components so as to ensure maximum impact.
- Step 4. Implement the strategy or plan and assess its impact and effects on target audiences so as to identify components that require course correction.
- Step 5. Carry out a post program evaluation of the effectiveness of the communications strategy so as to demonstrate the contribution to the organizations objectives and to document lessons learned.

STEP 1 - PUBLIC ENVIRONMENTAL ANALYSIS

As a result of ongoing public environmental analysis, or as a result of a new government policy or program, a communications requirement is identified. A synopsis of the public environment provides a comprehensive description of what is happening, or what the likely reactions will be to an announcement of a new policy or program. There are a wide variety of tools that can be employed in carrying out Public Environmental Analysis (PEA). They include:

Primary Research:

- Mail Surveys
- Telephone Surveys
- On-line Surveys
- User Surveys
- Focus Groups
- Executive Interviews

Secondary Research:

- Media Monitoring and Analysis
- Stakeholder Tracking
- Public Enquiries & Ministerial Correspondence Tracking
- Case Studies
- Expert Opinion & Peer Review
- Secondary Data Analysis

A Public Environmental Analysis report should summarize the current public perceptions and sensitivities on the issue and identify national and regional patterns. In preparing this synopsis, it may be appropriate to:

- ! outline the findings of any special studies or public opinion polls on the topic;
- ! identify noteworthy attention given to the issue in the House of Commons (e.g. questions, statements);
- ! summarize both national and regional media coverage of the issue, noting any significant trends;
- ! specify trends revealed by an analysis of enquiries to the department and correspondence or petitions to the Minister; and
- ! indicate unusual lobbying activities, demonstrations or other public pressures.

To aid in evaluating public environmental analysis activities, the Step 1. Public Environmental Analysis Checklist is provided at the end of this discussion paper.

STEP 2 - PLANNING

Formulate Objectives

The objectives of the communications activity should flow from the objectives of the policy or program that is to be announced and from the Public Environmental Analysis. Depending on the requirement, the objectives could be to:

- ! disseminate information (Output Measurement)
- ! improve understanding and or acceptance (Out-take Measurement)
- ! change specific attitudes and/or behaviour (Outcome Measurement)

Regardless of the type of communications activity, the objective should specify a desired outcome and be SMART (**S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**imely).

Develop Themes and Messages

In developing themes and messages, it is important to identify the key messages intended for the target audience that are to be communicated through the activity. These themes and messages should not be cluttered with details. For each, a brief rationale should be presented. Finally, the themes and messages should be linked to the global goals of the government.

Identify Target Audiences

Accurately identifying the target audience for the activity serves many purposes. These include:

- ! laying the groundwork for the best type of communications vehicle to be used;
- ! identifying all national and regional groups that have or could have an interest in the issue and/or program;
- ! establishing a benchmark for the success of the campaign (i.e. identify the target groups that must be reached for the campaign to achieve its objectives); and
- ! identify target groups that should be consulted before and/or after the activity is distributed to gauge the impacts and effects of the activity.

The major target audience should be defined in terms of their:

- size;
- location;
- characteristics;
- information requirements; and
- priority.

Choice of Communications Activity

The choice of the communications to be employed depends on a number of variables such as:

- ! approach to the campaign (e.g. proactive or reactive; low or high profile);
- ! nature of the target audience (e.g. national or regional; narrow or broad; level of education; size);

- ! the complexity of the issue or information disseminated;
- ! communications opportunities that exist (e.g. widespread public and/or media support for the issue; support of interest groups and/or provincial governments; major events offering appropriate symbolic support for the initiative);
- ! communications impediments that exist (e.g. media hostility; public indifference; complexity of the issue; competing regional, sectoral or international interests);
- ! timing (e.g. choice of launch date, length of campaign/program);
- ! budget (e.g. amount required to launch and sustain campaign; source of funds); and
- ! ministerial involvement (e.g. role in announcement, public perception of minister(s), language capability).

Determining Timing and Dissemination Strategies

This aspect is concerned with the timing of the program (e.g. launch, follow-up, running time) and the dissemination of the activity.

- ! In terms of timing, the following must be taken into consideration:
- ! when the activity is needed;
- ! the time needed to properly produce the activity;
- ! the time it will take for the activity to reach the target audience;
- ! the anticipated elapsed time for the intended objectives to be achieved; and
- ! optimal timing for disseminating further information to reinforce the message.

Dissemination involves:

- ! getting the message and vehicles to the target audience in a timely and cost-effective manner as possible;
- ! reinforcing the message through multiple activities (if appropriate);

- ! minimizing the chances that the activity will be sent a number of times to the same individual (e.g. duplication or overlap in mailing lists); and
- ! minimizing the waste that occurs when the activity reaches people beyond the target audience.

The Planning Checklist at the end of this discussion paper provides criteria against which to assess the planning of the communications activity.

STEP 3- DEVELOPMENT

Production Schedule and Budget

During the planning phase of the activity, some preliminary thought will have been given to the schedule and budget for the activity. It is at this phase that a detailed budget and schedule must be prepared that provides the basis with which to monitor and assess the progress of the activity through the development phase.

Assessment of Creative Components

The basis for development of the creative component will have taken place during the planning phase. As the creative is being developed, the following points should be taken into consideration:

- ! whether the overall content matches the objectives of the activity;
- ! whether the production is on schedule;
- ! whether the production is on budget;
- ! whether all individuals involved in the production of the activity have been briefed on the communications plan;
- ! whether the test and visuals have been analyzed to make sure the target audience will find them clear, interesting, and informative or persuasive; and
- ! whether the activity has received all the required approvals.

A pre-production test of the concept of major activity is recommended. Such a pretest can include:

- ! focus groups with the target audience;
- ! peer review; and

- ! review by originator and management.

The purpose of the pretest is to ensure that:

- ! the activity meets the objectives of the originator and senior management;
- ! the originator and senior management are satisfied with the creative components of the activity (e.g. images, colours, text); and
- ! the target audience receives the intended message.

Checklist 3 at the end of this discussion paper provides a list of development criteria.

STEP 4 - DELIVERY

Dissemination Schedule

During the development phase, a detailed schedule for the delivery of the activity is prepared.

The overall delivery schedule should identify:

- ! the launch and completion dates for the activity;
- ! the frequency with which activities should be used (e.g. the number of showings of an audio-visual, advertisements, number of publications distributed); and
- ! the number of individuals within the target audience who should be exposed to the activities.

Dissemination Monitoring

In monitoring the dissemination of the activities, central records should be maintained regarding what information went where and when. This would include such things as:

- ! which advertisements were placed in which media and when they were placed;
- ! which publications, brochure, or posters were distributed to which audiences, when, and how (e.g. by mass distribution or in response to enquiries);
- ! which exhibits were displayed at which locations, when, and how many people attended; and
- ! which reporters attended which news conference, or made an enquiry and what they reported in which media.

Dissemination Effectiveness

The purpose of assessing dissemination effectiveness is not to assess the effectiveness of the message of the activity, but rather whether the message reached the intended audience. As a result of monitoring the dissemination, an analysis of how many individuals within the target audience received the message can be made. This is then compared to the planned dissemination to assess whether:

- ! the message and activity reached the intended target audience;
- ! the activity was carried out in a timely and cost-effective manner;
- ! the message was properly reinforced; and
- ! duplication and overlap were minimized.

To assist in the monitoring and assessment of the delivery phase of an activity, the Step 4 - Delivery Checklist is provided at the end of this paper.

STEP 5 - EVALUATION

This final phase is concerned with assessing the extent to which the objectives of the activity were met.

If the campaign is properly planned, its evaluation is relatively easy. The evaluation of the activity is concerned with:

Communications Effectiveness

- ! Did the activity reach the intended target audience?
- ! Did the activity meet its communications objectives?

User Satisfaction

- ! Did the target audience find the activity to be informative and interesting?
- ! Did the activity address the requirements of the originator and the department?

Cost Effectiveness

- ! What is the cost per thousand reached?
- ! Was the activity produced within budget?

One of the keys to evaluating what a target audience learned from a communications campaign is to consistently measure the same knowledge, awareness, and understanding variables against those measured prior to the launch of the activity. As a result, the research conducted prior to the planning

of the activity (e.g. a survey), or information collected in the environmental monitoring process, can be used to make pre- and post comparisons. It is important to remember, however, that information from a number of sources (both controlled and not controlled by the organization e.g. the media or a special interest group) may affect the target audience.

The impacts and effects of a communications activity should be monitored and assessed as the program is being executed. This monitoring will enable the department to adjust the communications activity (if possible) to make it more effective.

To assist in the monitoring and assessment of the evaluation phase of an activity, the Step 5 - Evaluation Checklist is provided.

CONCLUSION

Evaluation of communications is not something done after the fact, but is integrated throughout the communications management process, as communications programs are planned, developed and delivered. Communicators should conduct self-evaluations on an ongoing basis, in order to ensure that objective's are achieved, management's message is successfully delivered, and that audience needs are effectively met. The benefits of evaluating communications throughout the process are:

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Public Environmental Analysis Checklist

Step 1. Undertake a Public Environmental Analysis so as to define the issues and opportunities that exist within the various internal and external audiences and benchmark the current situation.

CRITERIA	YES	NO
Is a sufficient body of research available to permit an adequate analysis of: - all internal stakeholders (minister's office, employees, managers, unions)? - all external stakeholders (taxpayers, clients, special interest groups, media)?	<input type="checkbox"/>	<input type="checkbox"/>
Are the available research data current enough to permit an accurate analysis of the communications environment?	<input type="checkbox"/>	<input type="checkbox"/>
Are the available research data reliable in terms of data collection methods used (e.g. if published, would the data withstand public scrutiny)?	<input type="checkbox"/>	<input type="checkbox"/>
Will the available research data permit an adequate examination of stakeholder opinion in relation to major issues?	<input type="checkbox"/>	<input type="checkbox"/>
Can stakeholder values be reliably determined from the available data?	<input type="checkbox"/>	<input type="checkbox"/>
Will the environmental analysis produced from the available data contribute a sufficient level of information to carry out strategic communications planning?	<input type="checkbox"/>	<input type="checkbox"/>
Are sufficient resources being allocated to permit the collection of reliable data to carry out the environmental analysis?	<input type="checkbox"/>	<input type="checkbox"/>
Does current research exist in another department or agency that could be used to meet the environmental analysis needs?	<input type="checkbox"/>	<input type="checkbox"/>
Is new primary research required to meet the environmental analysis needs?	<input type="checkbox"/>	<input type="checkbox"/>
Could this new primary research be shared with another department or agency?	<input type="checkbox"/>	<input type="checkbox"/>
Have all the necessary research approvals been approved?	<input type="checkbox"/>	<input type="checkbox"/>
Is there sufficient time to carry out the research?	<input type="checkbox"/>	<input type="checkbox"/>

Planning Checklist

Step 2. Interpret these issues and opportunities to senior management and formulate a communications plan/strategy that includes SMART (**S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**imely) communications objectives.

CRITERIA	YES	NO
Do we know how the identified issues and opportunities impact on the organization's goals, objectives, policies and programs?	<input type="checkbox"/>	<input type="checkbox"/>
Have we determined what the publics like or dislike about the organization?	<input type="checkbox"/>	<input type="checkbox"/>
Are the publics aware of the organization's goals, objectives, policies and programs?	<input type="checkbox"/>	<input type="checkbox"/>
Do we know why the publics feel the way they do?	<input type="checkbox"/>	<input type="checkbox"/>
Are we aware of the ways by which various publics have reacted before?	<input type="checkbox"/>	<input type="checkbox"/>
Have the strengths and weaknesses of the various publics been identified?	<input type="checkbox"/>	<input type="checkbox"/>
Are the threats and opportunities that the publics present to the organization known?	<input type="checkbox"/>	<input type="checkbox"/>
Has it been determined what the organization has to do to improve its image?	<input type="checkbox"/>	<input type="checkbox"/>
Do we know how the public will respond to changes to the organization's goals, objectives, policies, programs, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
Is it possible to minimize negative reaction?	<input type="checkbox"/>	<input type="checkbox"/>
Have we identified how to get the maximum out of an opportunity?	<input type="checkbox"/>	<input type="checkbox"/>
Have Specific communications goals and objectives been defined? (e.g. audiences, messages, desired response, timetable)	<input type="checkbox"/>	<input type="checkbox"/>
Have these goals and objectives been defined in Measurable terms? (e.g. awareness, understanding, support, action)	<input type="checkbox"/>	<input type="checkbox"/>
Are these goals and objectives Achievable given the public environment, timing and available resources?	<input type="checkbox"/>	<input type="checkbox"/>
Are these communications goals and objectives Relevant to the organization?	<input type="checkbox"/>	<input type="checkbox"/>
Can these communications goals and objectives be achieved in a Timely fashion so as to contribute the overall objectives of the organization?	<input type="checkbox"/>	<input type="checkbox"/>

Development Checklist

Step 3. Develop a strategic public relations/communications program that integrates policy, objectives, messages and communications techniques, and pretest its components so as to ensure maximum impact.

CRITERIA	YES	NO
Have the intended audiences been identified?	<input type="checkbox"/>	<input type="checkbox"/>
Has the best message to reach each audience been defined?	<input type="checkbox"/>	<input type="checkbox"/>
Has the best medium to communicate the intended messages been identified?	<input type="checkbox"/>	<input type="checkbox"/>
Can this medium be effectively tied in with another medium?	<input type="checkbox"/>	<input type="checkbox"/>
Should this message be tied in with another message?	<input type="checkbox"/>	<input type="checkbox"/>
Has the timing been identified?	<input type="checkbox"/>	<input type="checkbox"/>
Is the audience large enough or significant enough to warrant the action?	<input type="checkbox"/>	<input type="checkbox"/>
Will the strategy or plan of action meet the requirements of the audience?	<input type="checkbox"/>	<input type="checkbox"/>
Does the strategy or plan of action support the overall objectives of the organization?	<input type="checkbox"/>	<input type="checkbox"/>
Given the audience, is the proposed content and format appropriate?	<input type="checkbox"/>	<input type="checkbox"/>
Will this medium reach the audience?	<input type="checkbox"/>	<input type="checkbox"/>
Has the overall strategy and its individual components been pre-tested?	<input type="checkbox"/>	<input type="checkbox"/>

Delivery Checklist

Step 4. Implement the strategy or plan and assess its impact and effects on target audiences so as to identify components that require course correction.

CRITERIA	YES	NO
Is the strategy on budget and on schedule?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy receive all of the appropriate approvals?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy or plan produce the communications outputs that were intended?	<input type="checkbox"/>	<input type="checkbox"/>
Is the message reaching all of the intended target audiences?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy or plan communicate the objectives it was intended to address?	<input type="checkbox"/>	<input type="checkbox"/>
Is the strategy achieving the desired audience impact?	<input type="checkbox"/>	<input type="checkbox"/>
Does the target audience believe the message?	<input type="checkbox"/>	<input type="checkbox"/>
Are there components of the strategy that are more or less effective?	<input type="checkbox"/>	<input type="checkbox"/>
Are there new tactics that should be added to the strategy?	<input type="checkbox"/>	<input type="checkbox"/>
Should more or fewer resources be directed at a particular target audience or geographic area.?	<input type="checkbox"/>	<input type="checkbox"/>
Has the public environment evolved/changed in such a fashion that would require an adjustment to the strategy?	<input type="checkbox"/>	<input type="checkbox"/>

Evaluation Checklist

Step 5. Carry out a post program evaluation of the effectiveness of the communications strategy so as to demonstrate the contribution to the organization's objectives and to document lessons learned.

CRITERIA	YES	NO
Was the strategy completed on budget and on schedule?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy or plan produce the communications outputs that were intended?	<input type="checkbox"/>	<input type="checkbox"/>
Did the message reach the intended audience?	<input type="checkbox"/>	<input type="checkbox"/>
Did the publics believe the message?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy or plan communicate the objectives it was intended to address?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy achieve the desired audience impact?	<input type="checkbox"/>	<input type="checkbox"/>
Did the strategy or plan address the requirements of the organization?	<input type="checkbox"/>	<input type="checkbox"/>
Has the impact/effectiveness of the strategy been documented?	<input type="checkbox"/>	<input type="checkbox"/>
Were there "lessons learned" that could be applied to future strategies?	<input type="checkbox"/>	<input type="checkbox"/>
Were the results of the evaluation made available in time for them to be useful?	<input type="checkbox"/>	<input type="checkbox"/>
Did the results of the strategy justify the cost of the program?	<input type="checkbox"/>	<input type="checkbox"/>
Was it determined how the strategy could have been improved?	<input type="checkbox"/>	<input type="checkbox"/>
Were actionable findings and recommendations produced as a result of carrying out the evaluation?	<input type="checkbox"/>	<input type="checkbox"/>
Have the results of the evaluation been added to the organizations public environmental analysis data base?	<input type="checkbox"/>	<input type="checkbox"/>